EXOR
TMA Admin Guide

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EXOR TMA Admin Guide

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Table of Contents

1 Introduction 1
2 Process Framework 2
2.1 Scheduling Frequencies – HIG2530 3
2.1.1 General Information 4
2.2 Process Types – HIG2500 5
2.2.1 General Information 6
2.3 Submit Process – HIG2510 8
2.3.1 General Information 9
2.3.2 TMA Configuration Check 9
2.3.3 Deeming of Permits 9
2.4 Process Monitor – HIG2520 10
2.4.1 General Information 11
2.4.2 Queuing mechanism for forwarding of notices 11
2.4.3 Warnings in Monitor Web Service Transactions (TMA3000) 13
3 Configuration 15
3.1 Product Options – HIG9130 16
3.1.1 General Information 16
3.1.2 Product Options 18
3.2 Domains – HIG9120 24
3.2.1 General Information 24
3.3 User Contact Details – HIG1834 25
3.3.1 General Information 25
3.4 View Archived Works/Sites – TMA1010 27
3.4.1 General Information 28
3.5 Lane Rental (Interim Solution) 30
3.5.1 Solution 30
4 Web Services 32
4.1 Monitor Web Service Transactions – TMA3000 33
4.1.1 General Information 33
4.1.2 Sorting Results 34
4.1.3 Restrict 35
4.1.4 Transactions 36
4.1.5 Review 40
4.1.6 Transaction Errors tab 42
4.1.7 Recipients tab 42
4.1.8 Review History tab 43

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4.1.9 Links 44
4.2 Send OD Data – TMA3030 47
4.2.1 General Information 47
5 Batch Processing, Inspections 48
5.1 Inspection Download – TMA5500 49
5.1.1 General Information 49
5.1.2 Inspection Download 49
5.2 Inspection Upload – TMA5600 51
5.2.1 General Information 51
5.2.2 Directories 52
5.2.3 File Selection 53
5.2.4 Message Log 54
5.3 Automatic Inspection Upload – TMA5610 55
5.3.1 General Information 55
5.3.2 Directories 56
5.3.3 Message Log 57
5.4 Inspection Batch File Summary – TMA5510 58
5.4.1 General Information 58
5.4.2 Sorting Results 58
5.4.3 Inspection Batch Files 59
5.4.4 Links 60
5.5 Inspection Upload Transaction Summary – TMA5620 62
5.5.1 General Information 62
5.5.2 Sorting Results 62
5.5.3 Inspection Upload Transaction Summary 63
6 Batch Processing, DCD Inspections 64
6.1 DCD Extract – TMA5515 65
6.1.1 General Information 65
6.1.2 Sorting Results 66
6.1.3 File Destination 66
6.1.4 File Destination 67
6.1.5 Works Extract 68
6.1.6 Street Extracts 69
6.2 Inspections Download to DCD – TMA5520 70
6.2.1 General Information 70
6.2.2 Inspection Download – All 72
6.2.3 Inspection Download – Inspectors 74
6.3 Automatic Inspection Download to DCD – TMA5530 76

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6.3.1 General Information 76
6.3.2 Automatic Inspection Download – All 78
6.3.3 Automatic Inspection Download – Inspectors 80
7 Batch Processing, TPI – TMA Performance Indicators 82
7.1 TPI Quarterly Extract – TMA5540 83
7.1.1 General Information 83
7.1.2 TMA Performance Indicator Quarterly Extract 84
8 Administration 86
8.1 Contacts – TMA0010 87
8.1.1 General Information 87
8.1.2 Filter 88
8.1.3 Contacts 89
8.1.4 Further Details 90
8.1.5 Contact Roles 91
8.2 Street Groups – TMA0020 92
8.2.1 General Information 92
8.2.2 Work with Existing Groups 93
8.2.3 Sorting Results 97
8.2.4 Create New Group 99
8.2.5 Sorting Results 102
8.3 Unassigned Streets – TMA0030 104
8.3.1 General Information 104
8.3.2 Unassigned Streets 104
8.4 User Street Groups – TMA0040 106
8.4.1 General Information 106
8.4.2 User Street Groups 107
8.5 My Street Groups – TMA0050 108
8.5.1 General Information 108
8.5.2 My Street Groups 109
8.6 Administer User Districts – NSG0120 110
8.6.1 General Information 110
8.6.2 Users 111
8.6.3 User Districts 112
8.7 My Districts – NSG0130 113
8.7.1 General Information 113
8.7.2 My Districts 114
9 Activities 115
9.1 Notice Review Rules – TMA2000 116

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9.1.1 General Information 116
9.1.2 Notice Review Rules 117
9.1.3 Notice Forwarding Rules 118
9.1.4 Recipient Groups 119
9.2 Notice Types – TMA2010 120
9.2.1 General Information 120
9.2.2 Notice Types 121
9.2.3 Valid Works Categories 122
9.3 Valid Notice Recipients – TMA2015 123
9.3.1 General Information 123
9.3.2 Notice Recipients 123
9.3.3 Recipient Details 124
9.4 Work Categories – TMA2020 126
9.4.1 General Information 126
9.4.2 Works Categories 127
9.4.3 Valid Notice Types tab 128
9.4.4 Valid Durations 129
9.5 Status Transitions – TMA2030 130
9.5.1 General Information 130
9.5.2 Status Transitions 131
9.5.3 FPN Transitions 132
9.5.4 Restriction Transitions 133
9.6 Agreement Types – TMA2040 134
9.6.1 General Information 134
9.6.2 Allowable Agreement Types 135
9.7 Notice Warnings – TMA2050 136
9.7.1 General Information 136
9.7.2 Notice Warnings 137
9.8 Section 74 Charges Profile – TMA2060 138
9.8.1 General Information 138
9.8.2 S74 Charge Regime 139
9.9 Spatial Relationships – TMA2065 140
9.9.1 General Information 140
10 Inspections 141
10.1 Inspections Metadata – TMA5200 142
10.1.1 General Information 142
10.1.2 Inspection Types 143
10.1.3 Inspection Outcomes 144

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The contents of this document, including system ideas and concepts, are confidential and proprietary in nature and are not to be distributed in any form without the prior written consent of Bentley, Inc.

10.1.4 Inspection Status Codes 145
10.1.5 Inspection Categories 146
10.1.6 Inspection Items 147
10.1.7 Inspection Sample Category items 148
10.1.8 Inspection Messages 149
10.1.9 Deletion Rules 150
10.2 Inspectors – TMA5290 151
10.2.1 General Information 151
10.2.2 Inspectors 152
10.3 Inspection Rulesets – TMA5300 153
10.3.1 General Information 153
10.3.2 Inspection Rulesets 154
10.4 Defect Inspection Schedules – TMA5270 156
10.4.1 General Information 156
10.4.2 Defect Inspection Schedules 157

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1 Introduction

The New Roads and Street Works Act 1991 went a long way towards coordinating works occurring on the Streets. This was achieved by a strict Noticing regime, where the Utility had to inform the Street Authority of the work they were proposing to do, thus allowing the Street Authority to coordinate within their area. Other notices had to be sent during the life of that works.

Streets are defined within a national standard called the NSG (National Street Gazetteer).

NRWSA itself has been improved through the years with the introduction of such 'features' as EToN (Electronic Transfer of Notices), which enabled organisations to transfer data electronically where previously it had been purely paper-based; Section 74 charges, which were charges incurred by Utilities for overrunning their proposed time in the Street.

All these additions were introduced to further prevent as much as possible the disruption caused by works occurring in our Streets.

The Traffic Management Act 2004 (TMA) takes the original legislation a stage further, still with the same purpose of avoiding disruption on our Streets. The noticing procedures have been completely overhauled and whereas Section 74 charging still occurs, there have been a couple of significant additions.

- Fixed Penalty Noticing, which enables the Street Authority to impose further financial penalties for a variety of misdemeanours by the Utilities digging holes in our Streets;
- Permit Schemes, where an Authority can operate a scheme whereby, Utilities must effectively apply for *space on the road* and will have to pay for the privilege. This is different to a non-permitting situation where a Utility (who is known as a Statutory Undertaker) has the right to occupy the street as long as they follow the notification procedure.

The purpose of this is to allow for better coordination and planning of activities, and thus cause less disruption.

The latest Code of Practice and EToN Technical Specification are still published under the auspices of the New Road and Street Works Act 1991. TMA can be seen as an addendum to this.

Note: Any data shown in example screenshots does not represent any customers live data; it is test data set up by Exor.

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2 Process Framework

This chapter describes the forms and processes used for the process framework. They are the following forms:

- Process Types – HIG2500
- Submit Process – HIG2510
- Process Monitor – HIG2520
- Scheduling Frequencies – HIG2530

The form descriptions provide you with detailed information about each form including:

- an overall description of the form.
- a detailed explanation of each field, including available features (such as List of Values), default values and other characteristics.
- helpful information for using the form.

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2.1 Scheduling Frequencies – HIG2530

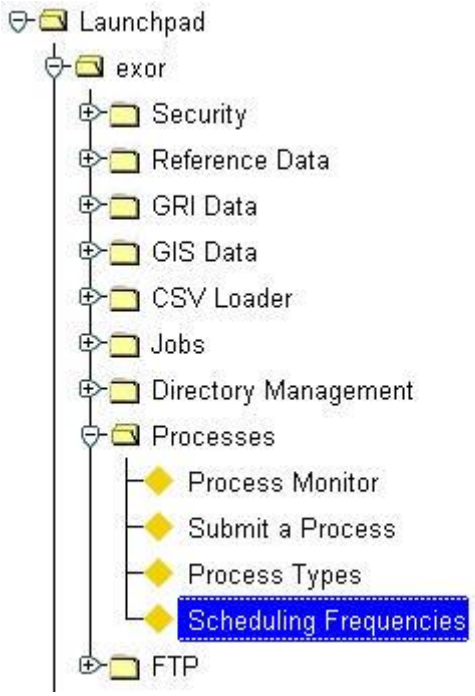

Figure 1 – Scheduling Frequencies menu

Scheduling Frequencies - HIG2530 - DORSET@wolvesev.GBEXOR920 HIG v4.2.1.0

Description	Scheduler Frequency	Interval (mins)	Next Schedule Date	Subsequent Date	Protected
Once			22-OCT-2010 16:33:22		☑
5 Minutes	freq=minutely; interval=5;	5	22-OCT-2010 16:38:22	22-OCT-2010 16:43:22	☑
10 Minutes	freq=minutely; interval=10;	10	22-OCT-2010 16:43:22	22-OCT-2010 16:53:22	☑
15 Minutes	freq=minutely; interval=15;	15	22-OCT-2010 16:48:22	22-OCT-2010 17:03:22	☑
20 Minutes	freq=minutely; interval=20;	20	22-OCT-2010 16:53:22	22-OCT-2010 17:13:22	☑
Hourly (on the hour)	freq=hourly; byminute=0; bysecond=0;		22-OCT-2010 17:00:00	22-OCT-2010 18:00:00	☑
30 Minutes	freq=minutely; interval=30;	30	22-OCT-2010 17:03:22	22-OCT-2010 17:33:22	☑
45 Minutes	freq=minutely; interval=45;	45	22-OCT-2010 17:18:22	22-OCT-2010 18:03:22	☑
Hourly	freq=hourly;	60	22-OCT-2010 17:33:22	22-OCT-2010 18:33:22	☑
Daily at Midnight	freq=daily; byhour=0; byminute=0; bysecond=0;		23-OCT-2010 00:00:00	24-OCT-2010 00:00:00	☑
Daily at Midday	freq=daily; byhour=12; byminute=0; bysecond=0;		23-OCT-2010 12:00:00	24-OCT-2010 12:00:00	☑
Daily	freq=daily;	1440	23-OCT-2010 16:33:22	24-OCT-2010 16:33:22	☑
Weekly	freq=weekly;		29-OCT-2010 16:33:22	05-NOV-2010 16:33:22	☐

Figure 2 – Scheduling Frequencies

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2.1.1 General Information

This form allows the set of frequencies/repeat intervals to be specified. Frequencies shipped by *Exor* will be flagged as 'protected' and cannot be removed or amended.

For further information on the Scheduling Frequencies module refer to the Exor General System Administration Guide.

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2.2 Process Types – HIG2500

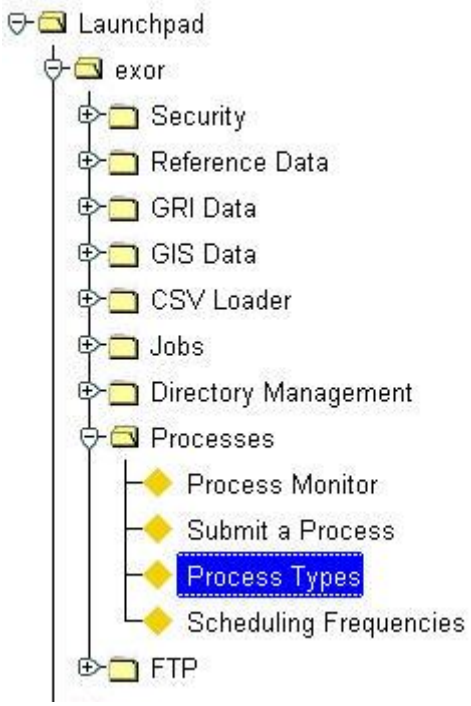

Figure 3 – Process Types menu

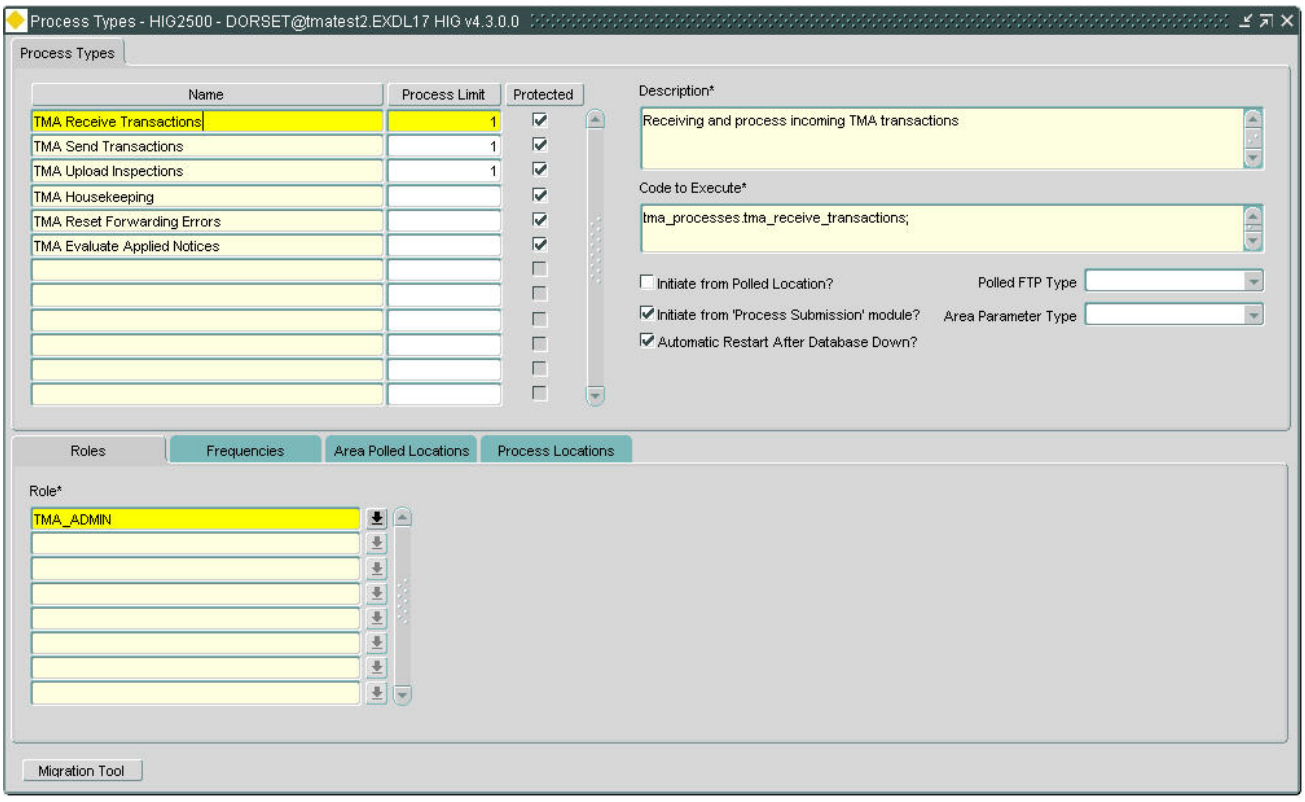

Figure 4 – Process Types

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2.2.1 General Information

The process types form is where existing process types for TMA can be viewed. TMA process types shipped with the system are flagged as protected and certain attributes pertaining to these cannot be amended.

In order to be able to create or amend a process the user must have been granted the role PROCESS_ADMIN in form *Roles – HIG1836*. (Refer to the General System Administration Manual.)

The process framework allows the processes to be easily:

- initiated
- monitored
- amended
- disabled/enabled

For example; an Administrator could disable the processes which send/receive transactions whilst system maintenance and or gazetteer loading are taking place.

Process types within the system used for TMA are as follows:

Table 1

Process Type	***Default Allowable Frequencies***
TMA Receive Transactions	5 Minutes 10 Minutes 15 Minutes 20 Minutes 30 Minutes Hourly On the Hour
TMA Send Transactions	5 Minutes 10 Minutes 15 Minutes 20 Minutes 30 Minutes Hourly On the Hour
TMA Housekeeping	Daily at Midnight Daily
TMA Reset Forwarding Errors	Daily at Midnight Daily
TMA Upload Inspections	5 Minutes 10 Minutes 15 Minutes 20 Minutes 30 Minutes Hourly On the Hour
TMA Evaluate Applied Notices	Daily
TMA Works Phase Master Refresh	Daily at Midnight
TMA Inspection Deletion	Daily at Midnight
TMA ADHoc Inspection Scheduler	Scheduled through *Schedule Inspections – TMA5100*
TMA Forward Notice Bpel Queue	30 seconds

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Other values for frequencies can be associated to a process type if required. These values can be defined using form *Scheduling Frequencies – HIG2530.*

For further information on the Process Types module refer to the Exor General System Administration Guide.

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2.3 Submit Process – HIG2510

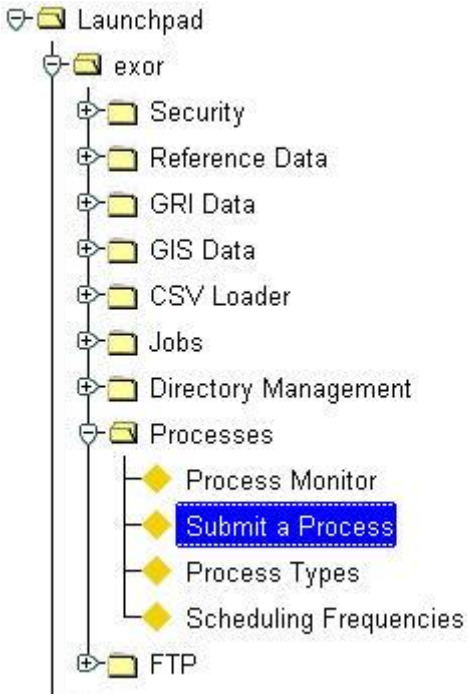

Figure 5 - Submit Process menu

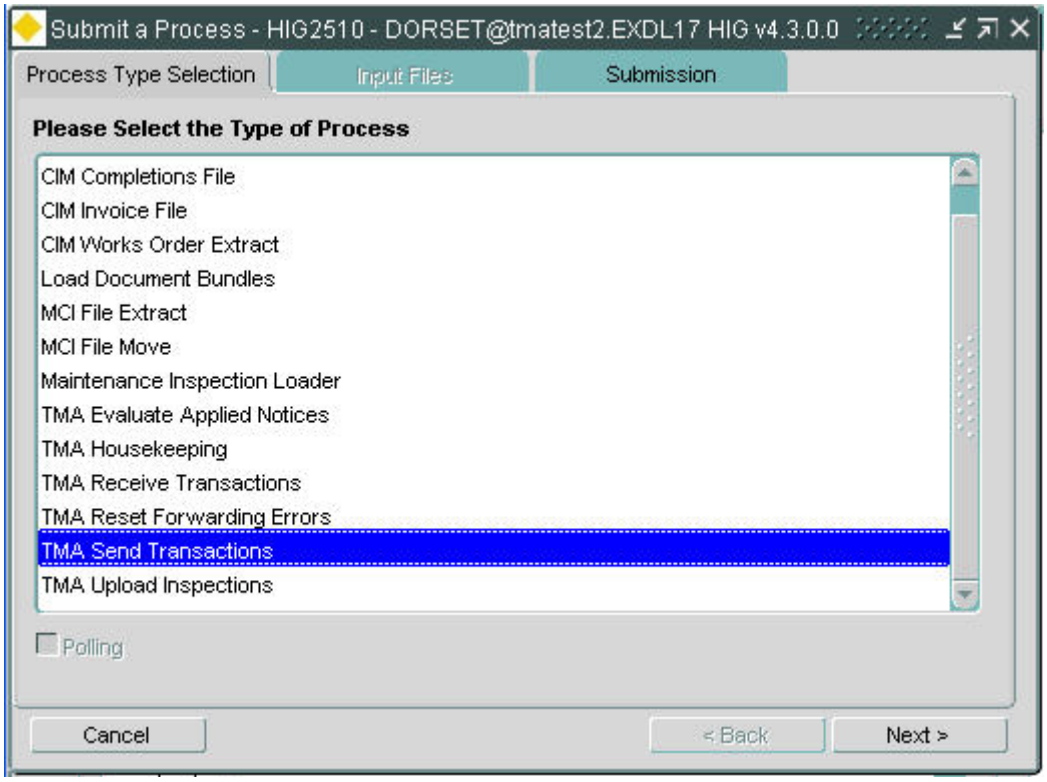

Figure 6 - Submit Process

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2.3.1 General Information

This form is used for the submission of any process of any type. Tabs on the form are enabled/disabled depending on:

- how the form has been invoked
- the process type that has been selected

Note: For TMA processing an Administrator must submit a Process of each relevant type at the desired frequency.

For further information on the Submit Process module refer to the Exor General System Administration Guide.

2.3.2 TMA Configuration Check

When form *Works – TMA1000* (and other key forms are opened) a check is carried out to see if TMA is correctly configured.

This check will look for the existence of a process of each given type.

Table 2

Process Type	***Checking Rule***
TMA Receive Transactions	Mandatory – always checked for
TMA Send Transactions	Mandatory – always checked for
TMA Housekeeping	Mandatory – always checked for
TMA Reset Forwarding Errors	Only checking for if Product Option FWD_NOTICE = Y
TMA Upload Inspections	Only checking for if Product Option INSPAUTIMP = Y
TMA Evaluate Applied Notices	Mandatory – always checked for

If the process is expected to exist and it is either missing or is not ‘Running’ no ‘Scheduled’, an error will be flagged.

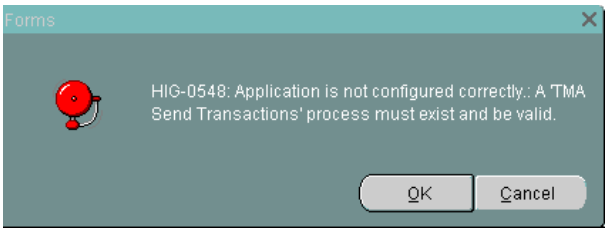
Forms
HIG-0548: Application is not configured correctly.: A 'TMA Send Transactions' process must exist and be valid.
OK
Cancel

Figure 7 -Warning

2.3.3 Deeming of Permits

When processing transactions and reporting on permit data, whether or not a permit is considered as ‘Deemed’ is derived on a daily basis.

To automate this process, a ‘TMA Evaluate Applied Notices’ process type is used.

Note: ‘TMA Evaluate Applied Notices’ process must be submitted to be executed on a daily frequency after midnight but before the working day commences.

It is essential that it is scheduled in this manner, so that the permit data is refreshed before the working day commences.

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2.4 Process Monitor – HIG2520

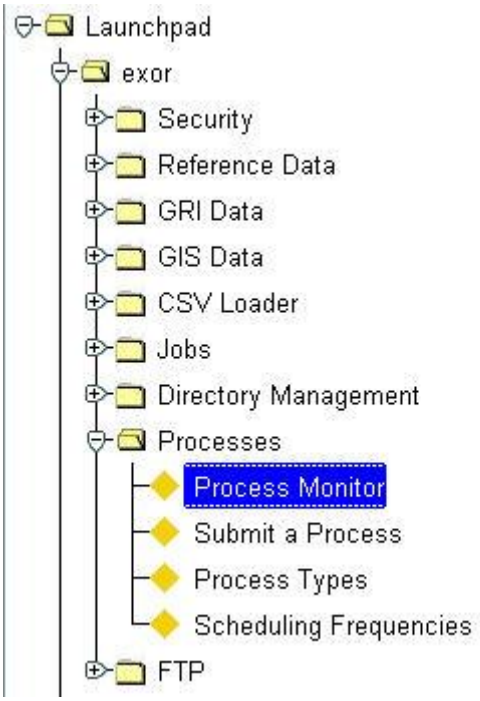

Figure 8 - Process Monitor menu

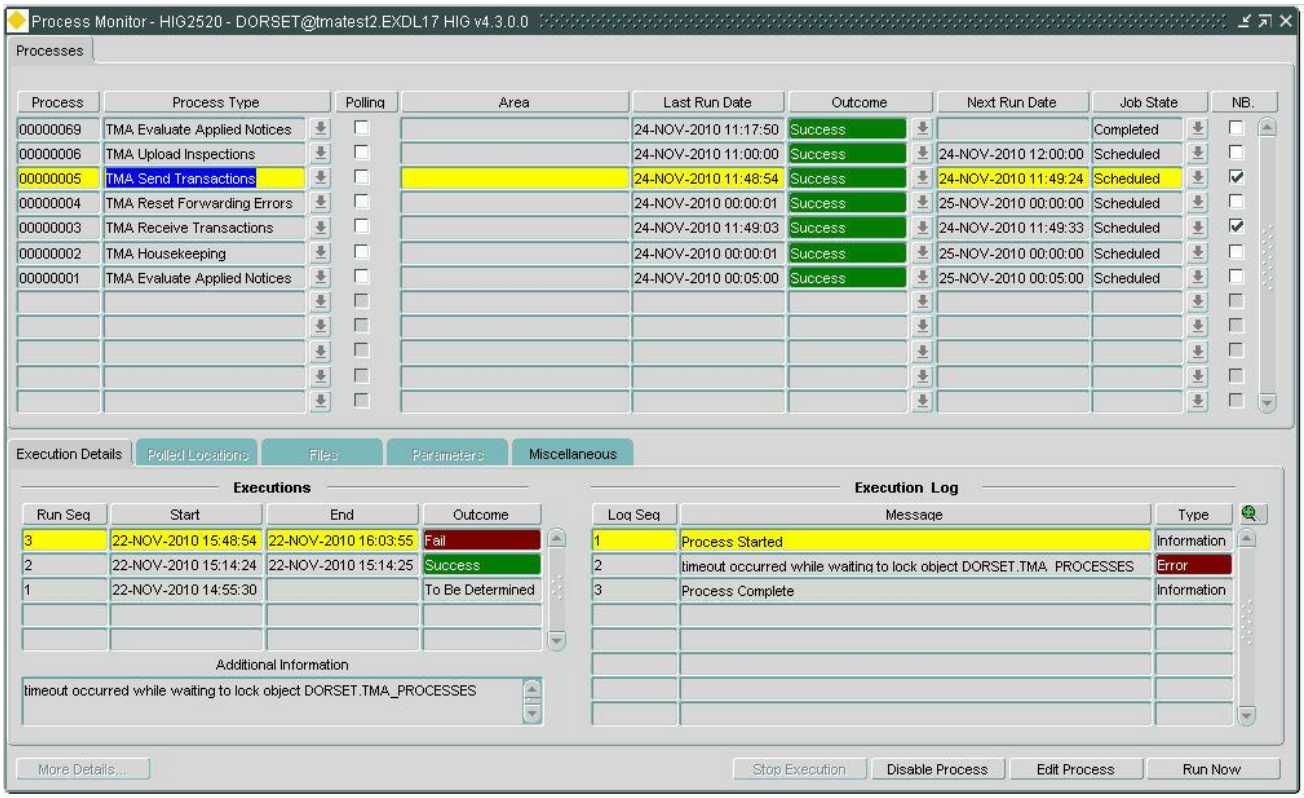

Figure 9 - Process Monitor

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2.4.1 General Information

This module shows the status of all processes that have been submitted. It shows the outcome of the process as well as the status of the scheduled job. It shows both process and scheduler related details.

An Administrator could use this form to disable a process whilst system maintenance and/or gazetteer loading are taking place.

For further information on the Process Monitor module refer to Exor General System Administration Guide.

2.4.2 Queuing mechanism for forwarding of notices

The basic functionality of these changes is to add a queue type mechanism to the Forwarding notice process. This Queue will feed the Forwarding Bpel process a steady stream of notices, smoothing out any peaks. The queue will be supported by some new processes written to report its health back to the user

The queue size should be determined via the product option TMABPELQUE which can be modified. Please note however, that regardless of TMABEPLQUE's value, the Web Service will only currently process 10 notices every 5 seconds (60 in 30 seconds, etc.).

The queue process will be driven from a process framework process that initially should run every 30 seconds to refresh the queue, but again this is configurable.

The basic flow of the process can be summarised with

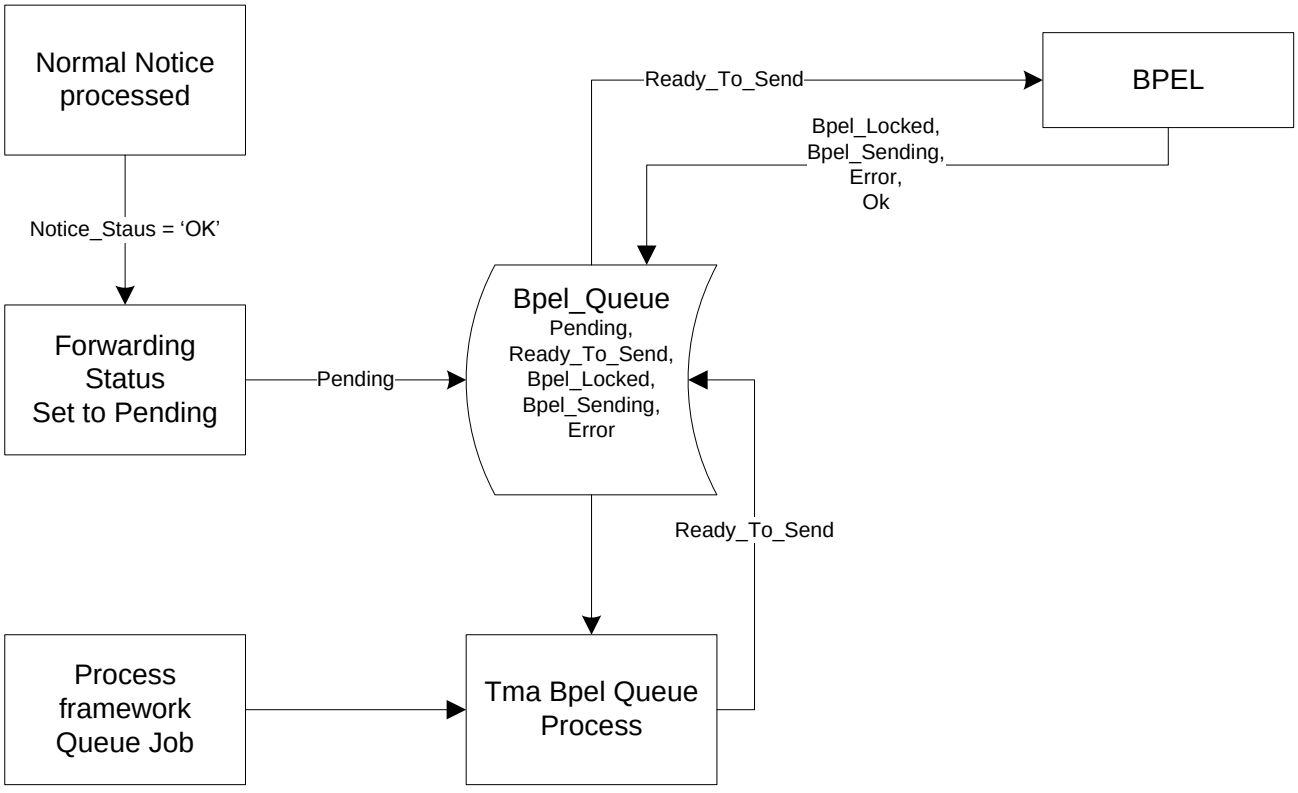

Figure 10 – Flow Diagram

- A notice gets processed normally and its notice status gets updated to 'OK'.
- The Fwd_Status is set to 'Pending'.

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- Every 30 seconds (initially) the process frame work queue job will fire and call the Queue process logic.
- The queue process logic will interrogate the outstanding Bpel Queue to determine if more notices need adding.
- If more notices are needed then they will have their statuses amended to Ready_to_Send, where the Bpel will pick them up and process them. If they are processed correctly then their status will be set to 'OK' thus removing them from the queue.

Below are examples of the Process Type and its execution:-

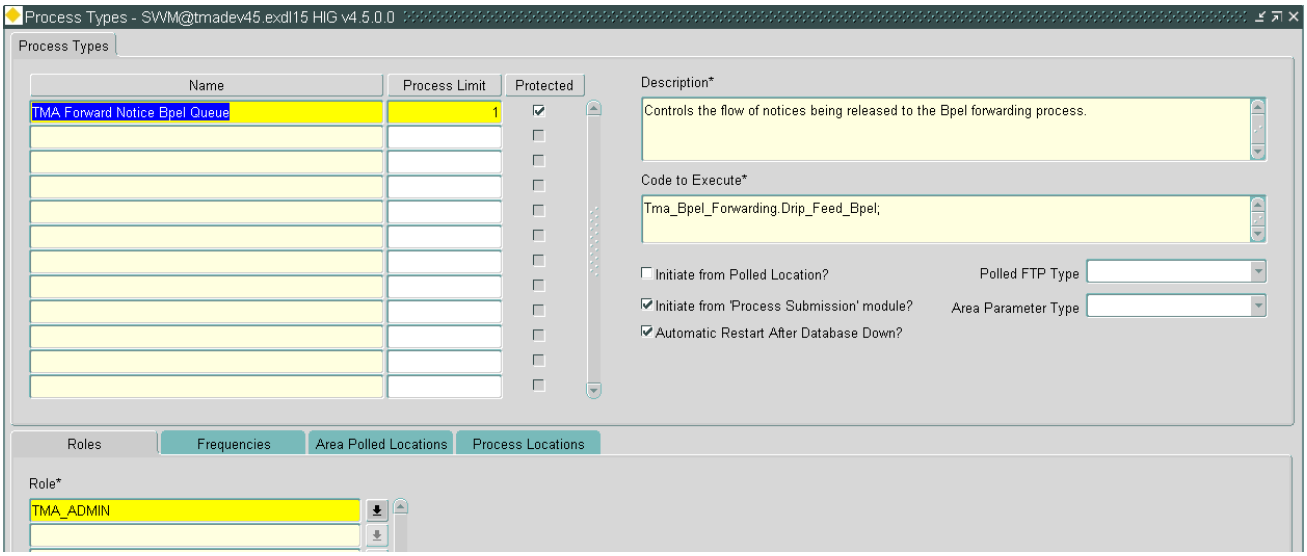

Figure 11 – Process Types

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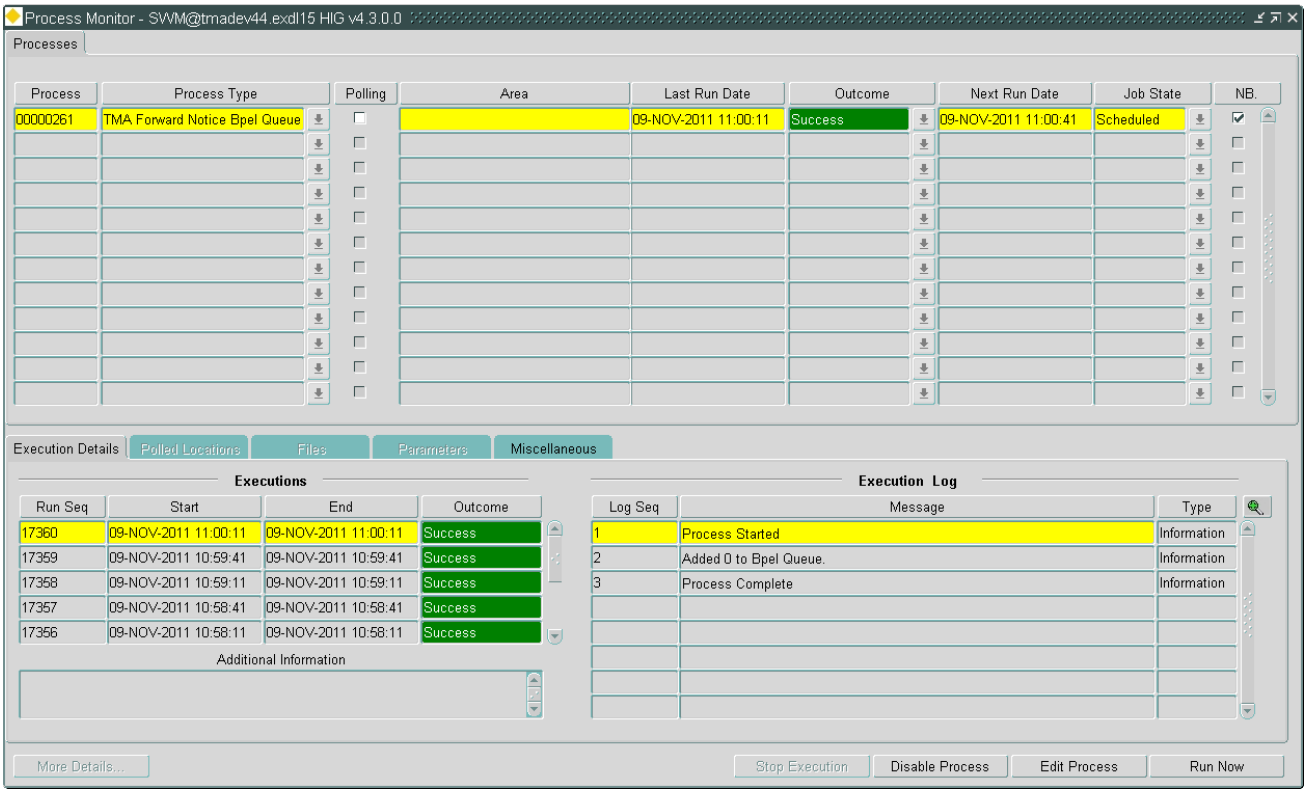

Figure 12 – Process Monitor

2.4.3 Warnings in Monitor Web Service Transactions (TMA3000)

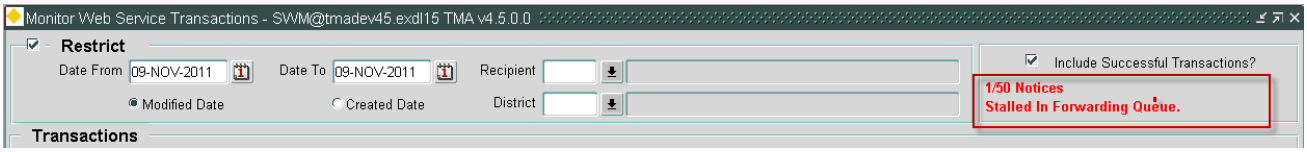

Figure 13 – Monitor Web Services Transactions - Restrict

As per the above example a message will appear in this module if any notice in the queue is at any of the active Bpel statuses (Ready_To_Send, Bpel_Locked, Bpel_Sending) or at a state of Error and the created date of that notice is one day or greater older than the systems current date. Should there be forwarding notices at these statuses, then no warning message will be visible.

This message will show the number of notices in the queue that are at these statuses, whilst also showing the size of the queue (see product option TMABPELQUE).

Please note it is possible for the number of notices at these statuses to exceed the queue size under the following circumstances:

- The queue logic was implemented / or started after a number of notices that exceeded the queue size were already at these statuses.
- The queue was previously set at a larger size, where the number of notices in the queue at one of the status mentioned exceeds the new queue size.

It should be noted that should the queue become full with notices at these statuses then the queue will affectively be stopped until they are cleared, meaning no more notice will be added to the queue. These errors

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will need to be addressed, either by resolving the issue of why they are unable to be forwarded or simply by setting their status to Ignore within this module.

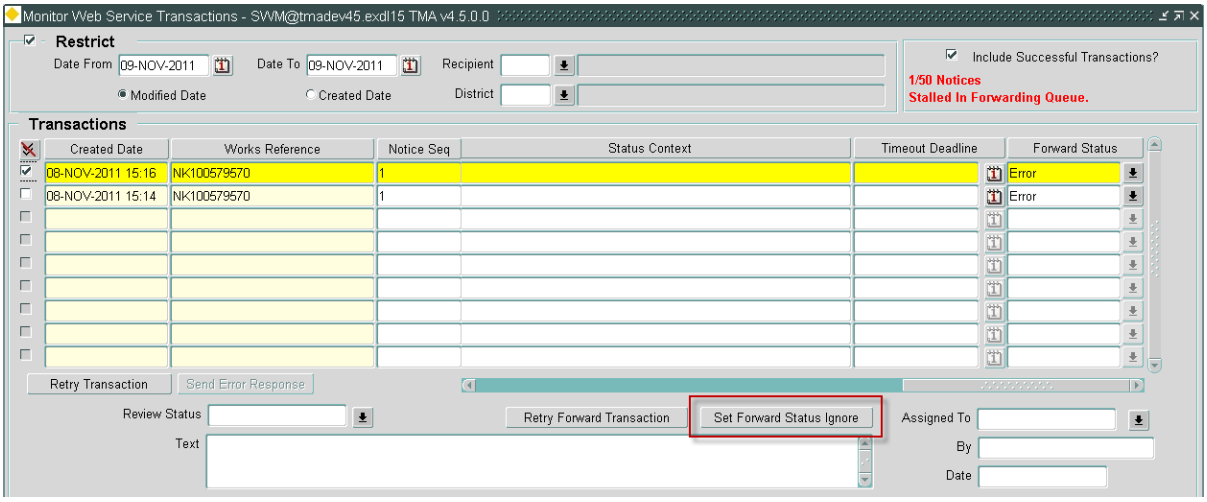

Figure 14 – Monitor Web Services Transactions - Transactions

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3 Configuration

This chapter describes the forms and processes used for the configuration in **TMA by Exor**. They are the following forms:

- Product Options – HIG9130
- Domains – HIG9120
- User Contact Details – HIG1934
- View Archived Works/Sites – TMA1010
- Lane Rental (Interim Solution)

The form descriptions provide you with detailed information about each TMA Works form in **TMA by Exor**, including:

- an overall description of the form
- a detailed explanation of each field, including available features (such as List of Values), default values and other characteristics
- helpful information for using the form

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3.1 Product Options – HIG9130

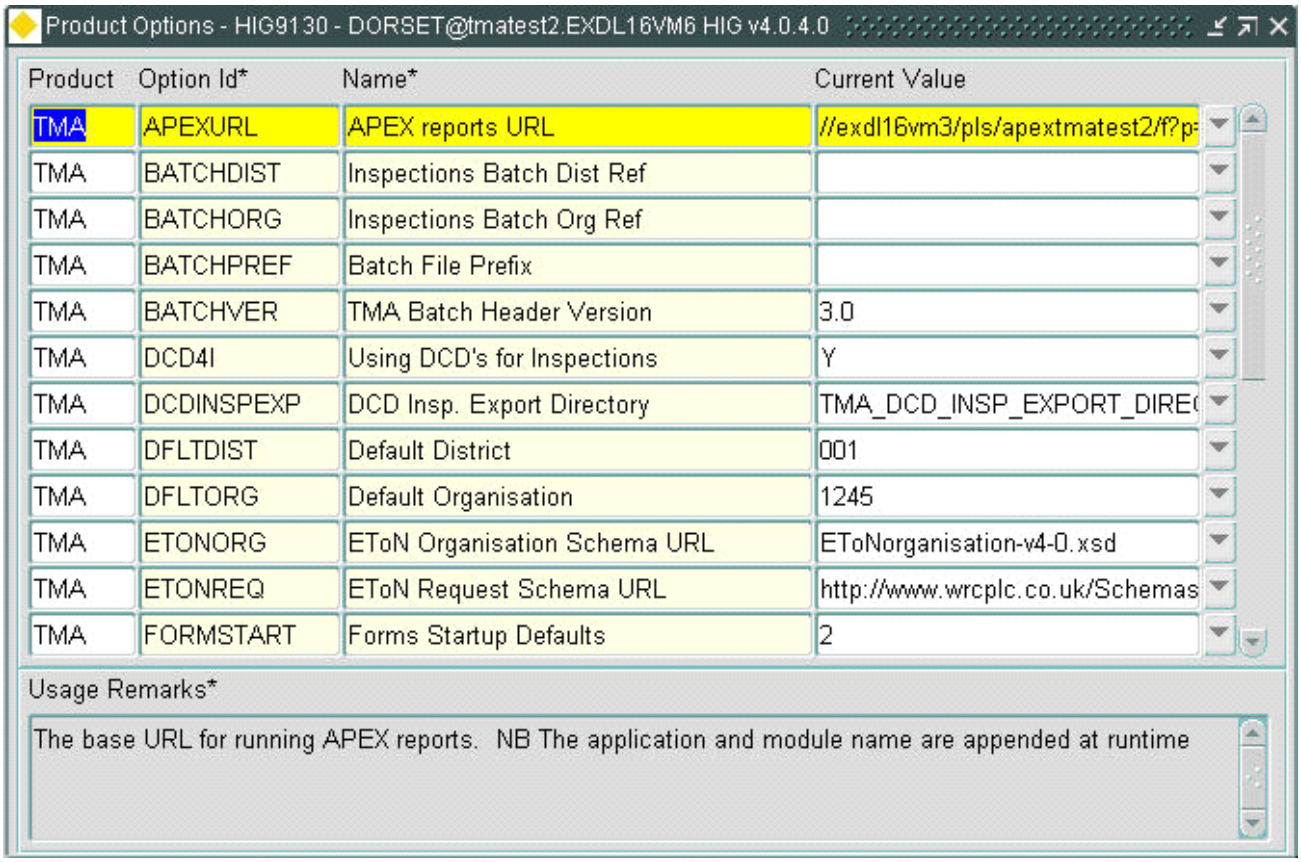
Product Options - HIG9130 - DORSET@tmatest2.EXDL16VM6 HIG v4.0.4.0
Product
Option Id*
Name*
Current Value
TMA APEXURL APEX reports URL //exdl16vm3/pls/apextmatest2/f?p=
TMA BATCHDIST Inspections Batch Dist Ref
TMA BATCHORG Inspections Batch Org Ref
TMA BATCHPREF Batch File Prefix
TMA BATCHVER TMA Batch Header Version 3.0
TMA DCD4I Using DCD's for Inspections Y
TMA DCDINSPEXP DCD Insp. Export Directory TMA_DCD_INSP_EXPORT_DIRE
TMA DFLTDIST Default District 001
TMA DFLTORG Default Organisation 1245
TMA ETONORG EToN Organisation Schema URL EToNorganisation-v4-0.xsd
TMA ETONREQ EToN Request Schema URL http://www.wrcplc.co.uk/Schemas
TMA FORMSTART Forms Startup Defaults 2
Usage Remarks*
The base URL for running APEX reports. NB The application and module name are appended at runtime

Figure 15 - Product Options

3.1.1 General Information

Product Options allow 'switches' or default values to be set, which defines how certain functionality operates within the Exor suite of Products. The following TMA Manager related Product Options should be set to suit your organisational requirements. Product Options are set using Product Options – HIG9130.

The values for Product Options are normally defined during Product Implementation or Upgrade and should not be amended without consultation with Exor support staff.

Product Options values are maintained using *Product Options – HIG9130*.

The Product Options themselves are 'registered' and defined using *Product Option List – HIG9135.*

Several Product Options may have a User Option of the same name. The Product Option will act as the default settings. The system will check for the existence of a User Option value that will take precedence over the Product Option value. If no User Option value has been defined for the User the Product Option value will be used. Product Options that also have an accompanying User Option are marked with an Asterisk (*) below.

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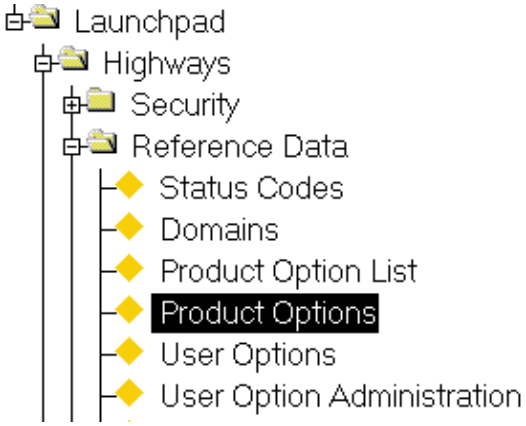

Figure 16 – Product Options Menu

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3.1.2 Product Options

The following Product Options must be defined in **Product Options – HIG9130** to ensure that your system meets both your and current TMA requirements.

PRODUCT OPTIONS ARE SET-UP DURING INSTALLATION AND SHOULD NOT BE CHANGED WITHOUT FIRST CONSULTING WITH EXOR SUPPORT STAFF.

Table 3

Product	*Option Id*	*Option Name*	*Sample Value*	*Usage Remarks*
TMA	***APEXURL***	***APEX reports URL***	***http://exdl7vm13/quartz/reports***	This option should display the base URL for running APEX reports. NB the application and module name are appended at runtime.
TMA	***APINOISSUE****	***API Do Not Issue***	***N***	If set to N the External API will operate as normal. Notices will be issued or held for review if required. If set to Y only Works and Phase details will be created. No Notices will be created and issued or held for review.
TMA	***BATCHDIST****	***Inspection Batch Dist Ref***		Set this option to the District reference to put into inspections files batch header. If left null then the inspection owner district reference will be used
TMA	***BATCHORG****	***Inspection Batch Org Ref***		Set this option to the District reference to put into inspections files batch header. If left null then the inspection owner organisation reference will be used
TMA	***BATCHPREF****	***Batch File Prefix***	***A***	This option defines the batch file prefix. Options are either A or S
TMA	***BATCHVER***	***TMA batch header version***	***3. 0***	This option defines the EtoN batch header version number
TMA	***BPELTMOUT****	***BPEL timeout duration***	***30***	Maximum time (in minutes) to wait for a BPEL send time out.
TMA	***CATDSTPOV***	***Category D Stop Overrun***	***N***	This flag is set to indicate the Inspection Date used when scheduling Category D Stop Overrun Inspections. If set to 'N' this will be the Schedule Date. If set to 'Y' this will be the day after the Works has completed (regardless whether it's a working day or not), provided that this date is after todays date. If not it will be todays date + 1.

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TMA	***CHARGEBAND***		***N***	This is used in conjunction with Category D Ad Hoc inspections. This controls when the Phase Charge Band will be downloaded to the Mobile as a comment. If set to Y then for users who issue Permit Response notices, any changes made to the phase record will be saved in the same action. If set to 'N' then any changes to the phase record will not be saved. The Default Value is 'N'
TMA	***CHGBNDLABL***		***Charge Band***	This is a User defined label when displaying the Charge Band. The default value is Charge Band.
TMA	***DCD41***	***Using DCDs for inspection***	***N***	Set this flag to denote whether DCDs are being used for Inspections. Options are either Y or N
TMA	***DCDFILPRFX****	***DCD Extract File Prefix***	***ALL***	This option defines the DCD extract file prefix. When DCDINSPCT is set to N then the file prefix will default to ALL
TMA	***DCDINSPCTR****	***DCD Extract per Inspector?***	***N***	This option defines how the DCD Extract files are to be created. If set to N this will be for all data. If set to Y this will be by available inspectors.
TMA	***DCDINSPEXP****	***DCD Insp. Export directory***	***TMA_DCD_INSP_EXPORT_DIRECTORY***	This option defines the name of the Oracle directory which is the destination for TMA DCD inspection batch files
TMA	***DEFCHRGBND***		***Charge Band***	This holds the default charge band to be used to update the Phase Charge Band when found to be inappropriate for the resulting Inspection
TMA	***DISUSEDEFR***	***DIS uses defect response***	***N***	This flag denotes whether or not the Defect Inspection Schedule refers to the Defect Response Period for the defect code(s) applied to the inspected site(s) when determining the start date of any follow up inspection.
TMA	***FORMSTART****	***Forms Startup Defaults***	***2***	This option defines whether the organisation and district details are defaulted in forms. 1 = Insert no defaults 2 = Insert organisation and district defaults
TMA	***FWD_NOTICE****	***Forward Notices?***	***N***	This option defines whether the forwarding notice functionality is used. Y = activate forward noticing functionality N = do not activate forward noticing functionality
TMA	***HOLDPNDNG****	***Hold back pending transactions***	***Y***	Holding back pending transactions if a previous transaction has not arrived/been successfully processed.
TMA	***IADDTELNO****	***Add Inspection telephone number***	***Y***	This option defines whether the inspectors telephone number is added to the Inspectors name in the Appendix E Batch file. Y = Yes, N = No.

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TMA	***IAUTOSCHED***	***Auto Inspection Schedule Date***	***0***	This flag is set to indicate the number of days to add to the current date when scheduling Category D Ad Hoc Inspections through the Automated Process Framework. For example; if set to 0 the schedule date will be today's date. If set to 1 the schedule date will be today's date + 1 etc. .
TMA	***ICOPYDEFCT****	***Copy Inspection Defect Data***	***1***	This option defines whether inspection defect details are to be copied on to the follow up inspection. 0 = No copy 1 = Copy all defects when creating Defect Site Visit, Defect Followup or Defect Followup Completion inspections.
TMA	***IEXEMP***	***Inspections Exemplary Nature***	***N***	This option determines whether the inspections of exemplary nature checkbox is displayed or not. Y = Display the checkbox N = Do not display the checkbox
TMA	***INSPAUTIMP***	***Auto Import Inspections***	***N***	This option defines whether or not the application is expected to be configured to allow automatic importing of inspection batches.
TMA	***INSPDOCLOC****	***Insp document location name***	***TMA INSPECTIONS PHOTOS***	This option defines the document location name that is used to support TMA inspection documents
TMA	***INSPDOCS****	***Inspections document directory***	***TMA_INSP_IMPORT_DOCS_DIRECTORY***	This option defines the Oracle Directory which is the destination for TMA inspections batch document files
TMA	***INSPDOCTYP****	***Inspection document type***	***PHOTO***	This option defines the document type that is used to support the TMA inspections document
TMA	***INSPEXP****	***Inspections export directory***	***TMA_INSP_EXPORT_DIRECTORY***	This option defines the name of the Oracle directory which is the destination for TMA inspection batch files
TMA	***INSPFAIL****	***Inspection fail directory***	***TMA_INSP_FAIL_DIRECTORY***	This option defines the name of the Oracle directory where TMA inspection batch files that fail to be successfully imported into the TMA application are moved to.
TMA	***INSPIMP****	***Inspection import directory***	***TMA_INSP_IMPORT_DIRECTORY***	This option defines the name of the Oracle directory which is the source for TMA inspection batch files that are to be imported into the TMA application.
TMA	***INSPPASS****	***Inspection pass directory***	***TMA_INSP_PASS_DIRECTORY***	This option defines the name of the Oracle directory where TMA inspection batch files that are successfully imported into the TMA application are moved.
TMA	***INSPREG***	***Inspection Regime***	***2***	This option determines the TMA inspection regime. 1 = 1,2,3,4,5 2 = A, B, C

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TMA	***INSPTELTYP****	***Inspectors Telephone No. Type***	***Mobile***	This option determines the method used to define which telephone number is to be used for the Inspectors telephone number.
TMA	***IPRNTFLAG****	***Inspection Print Flag***	***Y***	This flag indicates whether to update the inspection as being printed when called from TMA5000 Inspections module. When set to Y the Inspection will be marked as printed.
TMA	***ISEND***	***Inspection ready for sending***	***N***	This flag indicates whether an inspection is ready for sending during batch creation process. Y = Ready for sending N = Not ready for sending
TMA	***LOCKRECIPS***	***Lock noticing asst recipients***	***Y***	Used by the Noticing Assistant If set to 'Y' it will enable/disable recipients fields depending on notice type If set to 'N' it will always enable recipients fields
TMA	***NOTSCHLABL****	***Not schedulable label***	***Not Schedulable***	This option is used to define the label on forms and reports as 'Not Schedulable' or a label of the customers choosing. N. B. this must be in the same context as 'Not Schedulable'.
TMA	***OSWRKHRS***	***Default outside working hours flag***	***0***	Default flag setting for outside working hours. 0 = flag unticked 1 = flag ticked
TMA	***PNDNGTIME****	***Max time to hold pending TRX***	***720***	Maximum time (in minutes) to hold pending transactions.
TMA	***S74DEFCHRG***	***S74 Default charge calculation***	***S***	This option determines which Section 74 charges are to apply to an overrun. N = Not in carriageway S = Standard
TMA	***S74HAPROM***	***S74 charges for HA promoters***	***N***	This option determines whether Section 74 charges will be calculated on Works for Road Purposes carried out on behalf of the Highway Authority. The default is 'N'. Y = Yes N = No
TMA	***S74MINPRD***	***Section 74 Min works period***	***3***	Minimum works period used in Section 74 charging calculation
TMA	***SCHEDADHOC***		***N***	This controls if further Category D Ad-Hoc Inspections can be created by the Scheduler for the same phase but for a different day. The default value is 'N'
TMA	***SEQUIVRULE****	***Site***	***0***	This option defines the site equivalence function.

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		Equivalence Rule		0 = None (when sites are created the equivalence flag is not set) 1 = Set all sites (when sites are created the equivalence flag is set to a value of 1. This means that all sites on a works will be grouped together for inspection scheduling purposes.) 2 = Set to site location code (when sites are created the equivalence flag is set to the value of the site location code. Eg 1=carriageway, 2=footway, 3=verge, 4=cycleway, 5=footpath. This means that all sites on a works with the same location code will be grouped together for inspection scheduling purposes.
TMA	***SHAREDSTR****	***Shared Streets***	***N***	This flag is used to indicate if shared streets functionality is active. When set to Y the system will check if more than one Primary Noticing Authority for the street exists upon receipt of either an initial or confirmation notice.
TMA	***STREETINT***		***Street Group***	This is User defined and if utilised will hold the name of the corresponding User defined Street Group for your 'Streets of Interest'. Once populated with a Street Group name, a 'Streets of Interest' check box will be displayed on the Works (TMA1000) Module
TMA	***STRINTLABL***		***Street of Interest***	is a User defined label when displaying the 'Streets of Interest' checkbox. The default value is Street of Interest
TMA	***SWAPNOTICE****	***Swap notice if relevant***	***N***	This option defines whether to use the swap notice functionality. If set to Y, the notice will be swapped if the incorrect notice is specified. *e. g. ,* if issuing 0200 notice on a wholly permitted street it will be swapped to a 0210 notice.
TMA	***SXTRACTAUT****	***Auto DCD download STR XTRACT***	***U – Update***	This option defines the streets extract mode to employ when automatically downloading DCD inspections.
TMA	***SXTRACTMAN****	***Man DCD download STR XTRACT***	***U – Update or M-Master***	the streets extract mode to employ when manually downloading DCD inspections.
TMA	***TMABPELQUE***		***50***	This is the size of the notice queue that is sent to Bpel at any one time when dealing with forward notices. Default is 50.
TMA	***TMABUFFERR****	***Gross error buffer size***	***250***	This option is used to determine the buffer around the street dimensions for gross error validation of the load geometry against that street. I. e. to check data of poor quality before any other check is performed.
TMA	***TMABUFFPRX****	***Proximity buffer size***	***20***	This option is used to determine the buffer around the street dimensions for validation of the location geometry against that street.
TMA	***TMABUFFTOL****	***Tolerance buffer size***	***0. 5***	This option is used in the spatial analysis to determine equality of the location to the street. This option should not be changed without advice from Exor support.
TMA	***TMACOPYPHS****	***Copy Phase***	***2***	This option defines how a phase is to be copied. 1 = create a new phase with empty fields. 2 = prompt to either copy existing phase to new phase or create a new phase with empty fields.

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TMA	***TMAORUNPRD****	***Overrun Period***	***14***	This option determines the default TMA overrun period (in days) which is used by the form Query Overrunning Works – TMA1080 to limit the amount of overrun records returned for performance considerations. I. e. limit the records returned to the previous TMAORUNPRD days from the Effective Date.
TMA	***TMAPROVGRP****	***Dflt provisional street group***		This option defines the default street group into which newly created provisional streets should be assigned.
TMA	***TMAPROXVAL****	***Proximity Validation?***	***N***	This option validates that the location of a works is in the proximity of the ASD. Y = perform proximity validation, N = do not perform proximity validation.
TMA	***RECVTRANSQ***	***Received Transaction Queue***	***100***	This option is used to set the number of transactions at a status of WE_COMPLETE to be processed at any one time. If the value is Null then all WS_COMPLETE transactions will be processed. If set to 100 then only the first 100 transactions will be processed in that iteration.
TMA	***TMASITCORD****	***Copy phase coords to site***	***N***	This option populates the site feature type and coordinates with the phase feature type and coordinates on creation of a new site. Y = on creation of any site then auto-populate the site coordinates and feature type with the phase coordinates and feature type. N = on creation of any site then never auto-populate the site coordinates and feature type with the phase coordinates and feature type.
TMA	***TMAVALTOL***	***Timing Validation Tolerance***	***0***	This option defines the number of minutes allowed as the timing validation tolerance used when calculating if Notices are late.
TMA	***TMAWIPROFO***	***Works inspection pro forma TMA***	***Y***	This option indicates whether to print an additional page for each site on the Works Inspection reports for inspections with 'Unknown' outcome.
TMA	***WARNIFOK****	***Return warnings if no errors***	***Y***	If set to Y the system will return warnings raised by the API even if the call to the API resulted in no errors.
TMA	***WKENDDAY1***	***Weekend day 1***	***Saturday***	This option defines the name of the day used for the first weekend day.
TMA	***WKENDDAY2***	***Weekend day 2***	***Sunday***	This option defines the name of the day used for the second weekend day.
TMA	***WXTRACTAUT****	***Auto DCD download WKS XTRACT***	***U – Update***	This option defines the works extract mode to employ when automatically downloading DCD inspections.
TMA	***WXTRACTMAN****	***Man DCD WKS XTRACT***	***U – Update or M-Master***	This option defines the works extract mode to employ when manually downloading DCD inspections.

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3.2 Domains – HIG9120

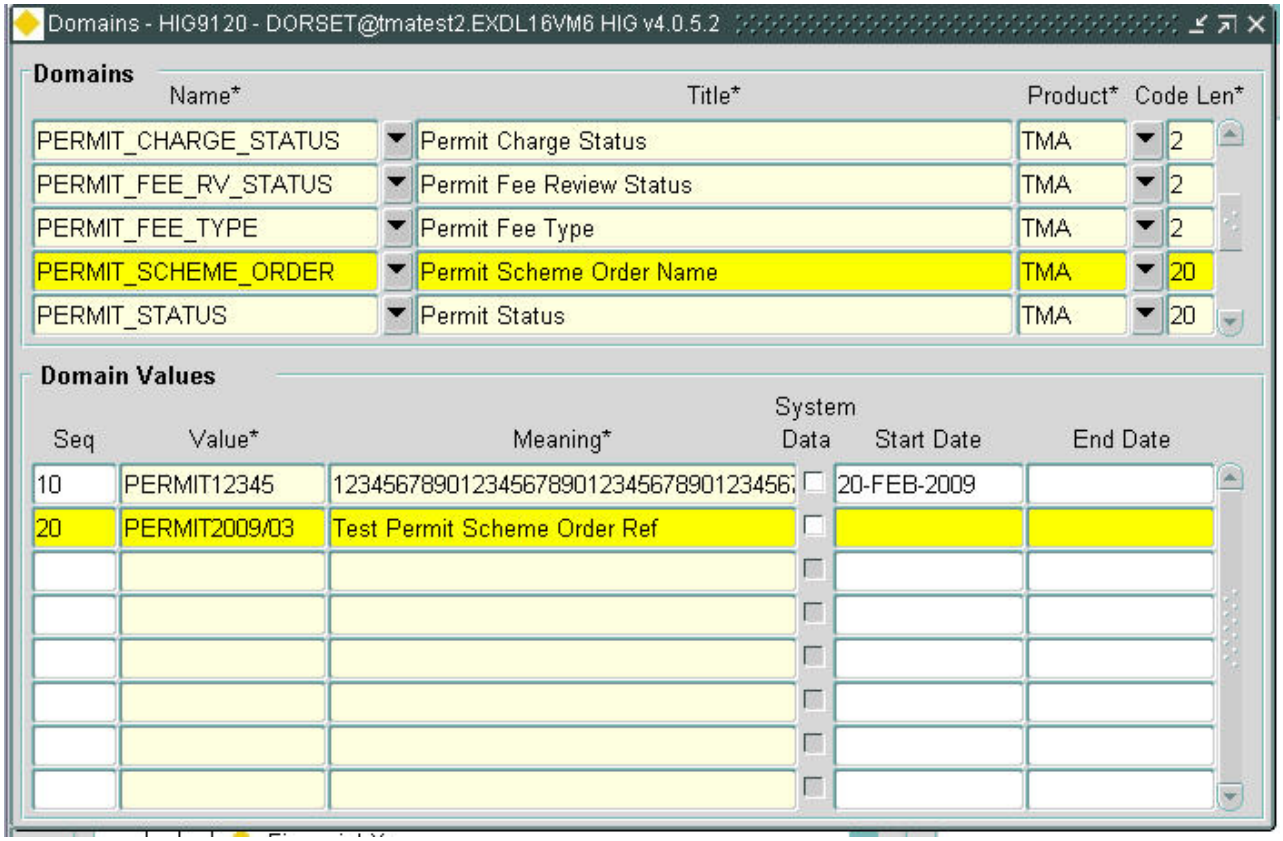

Figure 17 - Domains

3.2.1 General Information

TMA Manager uses various sets of reference values known as Domains. Each domain has its own set of values.

The Domain Values form is used for entering new values or modifying or deleting values associated with the reference domain in the Reference Domain field. These values appear in list of values in the TMA forms.

Note: Domains with associated Domain Values (Lookups flagged as 'System Data') must not be amended in any way.

Refer to the General System Administrator User Manual for further information.

Domain values that can be amended in the TMA module are:

NOTICE_REVIEWSTATUS – used in Review Notices – TMA1030

PERMIT_FEE_RV_STATUS – used in Permit Fees – TMA2070

PERMIT_SCHEME_ORDER – used in printing FPN Notice/FPN Withdrawal

S74_REVIEW_STATUS – used in S74 Charges – TMA1080

TRANS_REVIEWSTATUS – used in Monitor Web Services Transactions – TMA3000

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3.3 User Contact Details – HIG1834

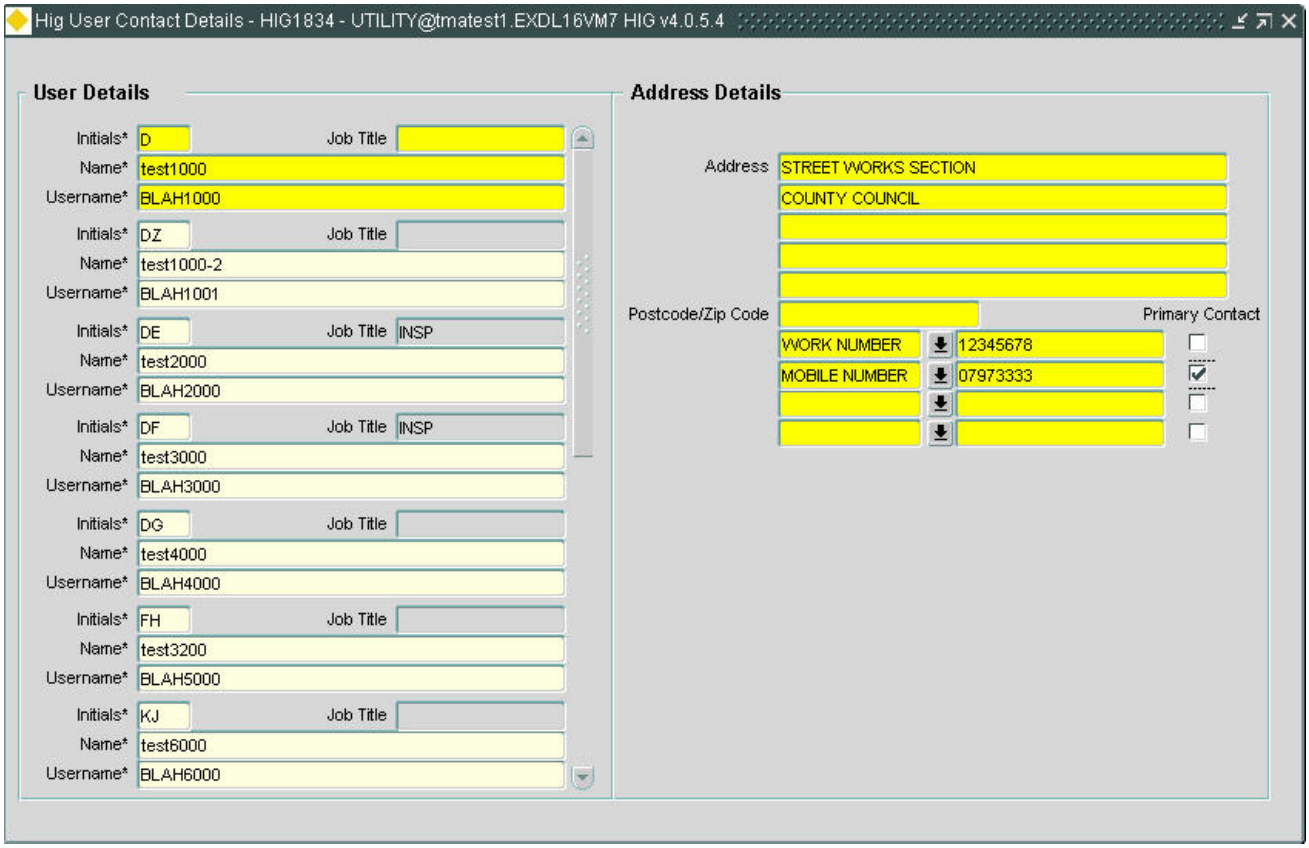

Figure 18 - User Contact Details

3.3.1 General Information

This form can also be accessed for a particular user from form *Users – HIG1832* and pressing the [**User Details**] button.

Users are set up using form *Users – HIG1832*. This information will be displayed in the User Details part of the form.

In the Address Details part of the form further contact details can be added to the user record including address and contact numbers. The contact number list are defined in *Domains – HIG9120* under the option USER_CONTACT_TYPES.

If the user has been logged as an inspector in form *Inspectors – TMA5290* then the contact number will be recorded against the Inspector in form *Inspections – TMA5000* and will be printed on the *Works Inspection Report – TMA6000*. Product Option – INSPTELTYP should be set to specify which telephone number is to be used.

Refer to the General System Administrator User Manual for further information.

Initials ***(Display Only)***

The user initials of the user will be displayed.

Job Title ***(Display Only)***

The job title of the user will be displayed.

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Name ***(Display Only)***

The name of the user will be displayed.

Username ***(Display Only)***

The username of the user will be displayed.

Address ***(Optional)***

Enter the address of the user.

Postcode/Zip Code ***(Optional)***

Enter the postcode of the address for the user.

The options for the next 4 fields are defined in *Domains – HIG9120* under the option USER_CONTACT_TYPES. The system values for these fields are:

- WORK – work number
- MOBILE – mobile number
- HOME - home number
- FAX – fax number

These can be added to as appropriate.

Primary Contact ***(Checkbox)***

Only one number can be selected as the primary contact number.

If the user has been logged as an inspector in form *Inspectors – TMA5290* then the contact number will be recorded against the Inspector in form *Inspections – TMA5000* and will be printed on the *Works Inspection Report – TMA6000*.

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3.4 View Archived Works/Sites – TMA1010

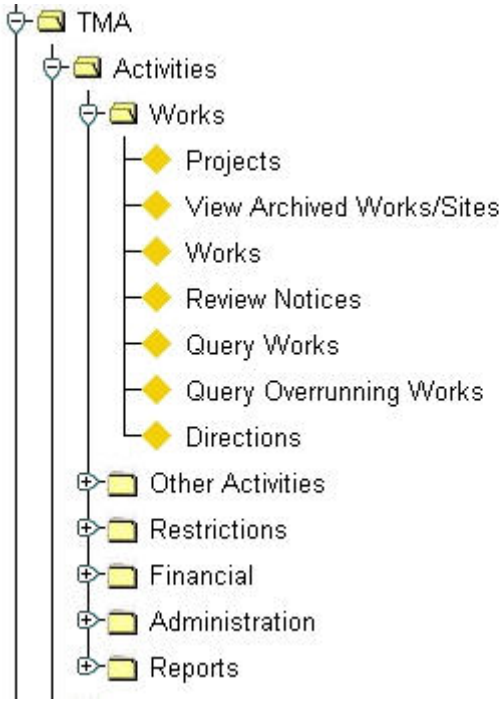

Figure 19 – View Archived Works/Sites Menu

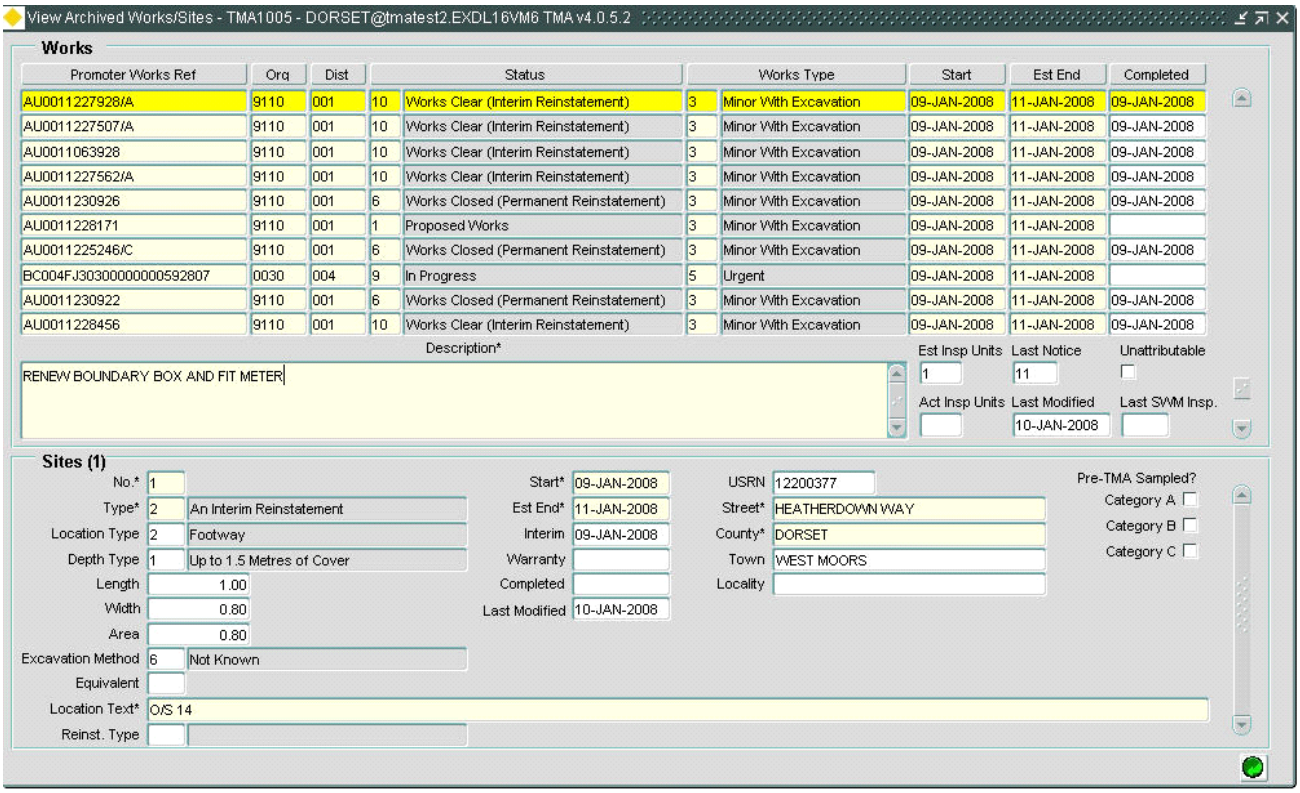
View Archived Works/Sites - TMA1005 - DORSET@tmatest2.EXDL16VM6 TMA v4.0.5.2
Works
Promoter Works Ref | Org | Dist | Status | Works Type | Start | Est End | Completed
AU0011227928/A | 9110 | 001 | 10 | Works Clear (Interim Reinstatement) | 3 | Minor With Excavation | 09-JAN-2008 | 11-JAN-2008 | 09-JAN-2008
AU0011227507/A | 9110 | 001 | 10 | Works Clear (Interim Reinstatement) | 3 | Minor With Excavation | 09-JAN-2008 | 11-JAN-2008 | 09-JAN-2008
AU0011063928 | 9110 | 001 | 10 | Works Clear (Interim Reinstatement) | 3 | Minor With Excavation | 09-JAN-2008 | 11-JAN-2008 | 09-JAN-2008
AU0011227562/A | 9110 | 001 | 10 | Works Clear (Interim Reinstatement) | 3 | Minor With Excavation | 09-JAN-2008 | 11-JAN-2008 | 09-JAN-2008
AU0011230926 | 9110 | 001 | 6 | Works Closed (Permanent Reinstatement) | 3 | Minor With Excavation | 09-JAN-2008 | 11-JAN-2008 | 09-JAN-2008
AU0011228171 | 9110 | 001 | 1 | Proposed Works | 3 | Minor With Excavation | 09-JAN-2008 | 11-JAN-2008
AU0011225246/C | 9110 | 001 | 6 | Works Closed (Permanent Reinstatement) | 3 | Minor With Excavation | 09-JAN-2008 | 11-JAN-2008 | 09-JAN-2008
BC004FJ30300000000592807 | 0030 | 004 | 9 | In Progress | 5 | Urgent | 09-JAN-2008 | 11-JAN-2008
AU0011230922 | 9110 | 001 | 6 | Works Closed (Permanent Reinstatement) | 3 | Minor With Excavation | 09-JAN-2008 | 11-JAN-2008 | 09-JAN-2008
AU0011228456 | 9110 | 001 | 10 | Works Clear (Interim Reinstatement) | 3 | Minor With Excavation | 09-JAN-2008 | 11-JAN-2008 | 09-JAN-2008
Description*
RENEW BOUNDARY BOX AND FIT METER
Est Insp Units
Last Notice
Unattributable
Act Insp Units
Last Modified
Last SWM Insp.
Sites (1)
No.* 1
Type* 2 An Interim Reinstatement
Location Type 2 Footway
Depth Type 1 Up to 1.5 Metres of Cover
Length 1.00
Width 0.80
Area 0.80
Excavation Method 6 Not Known
Equivalent
Location Text* O/S 14
Reinst. Type
Start* 09-JAN-2008
Est End* 11-JAN-2008
Interim 09-JAN-2008
Warranty
Completed
Last Modified 10-JAN-2008
USRN 12200377
Street* HEATHERDOWN WAY
County* DORSET
Town WEST MOORS
Locality
Pre-TMA Sampled?
Category A
Category B
Category C

Figure 20 – View Archived Works/Sites

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3.4.1 General Information

This form is used to see if the Works existed prior to the TMA being introduced.

If the Works does exist then a notice cannot be sent under the TMA unless the EToN 3 phase has been finished correctly.

An EToN 3 works will be deemed to have reached the end of the current phase when the following conditions have been met in sending systems:

For notices sent to English authorities:

- Works Status Code is either:
  - *Works Clear (Interim Reinstatement)*
  - *Works Closed (Permanent Reinstatement)*
  - *Permanent Reinstatement – Barholes*
- Site Status Code is either:
  - *Interim Reinstatement*
  - *Permanent Reinstatement*
  - *Site Closed*
  - *Site Closed (No Excavation)*
  - *Site Abandoned*
  - *Remedial Reinstatement (Reset Guarantee)*
  - *Remedial Reinstatement (Do Not Reset Guarantee)*

For notices sent to Welsh authorities:

- Works Status Code is either:
  - *Interim Reinstatement Complete*
  - *Permanent Reinstatement Complete*
  - *Works Clear (Interim Reinstatement)*
  - *Works Closed (Permanent Reinstatement)*
  - *Permanent Reinstatement – Barholes*
- Site Status Code is either:
  - *Interim Reinstatement*
  - *Permanent Reinstatement*
  - *Site Closed*
  - *Site Closed (No Excavation)*
  - *Site Abandoned*
  - *Remedial Reinstatement (Reset Guarantee)*
  - *Remedial Reinstatement (Do Not Reset Guarantee)*

All sites must have one of the site status codes listed above.

Note: Receiving systems may still reject notices if Works_Status_Code and Site_Status_Code combinations are illogical, e. g. , the works is closed but one or more sites is at status interim reinstated.

The [**Refresh**] button should be used on a daily basis to keep the archived works up to date within the TMA product.

For example, if an inspection is done or received on a works that was created before TMA was implemented the works must exist in the Archived Works/Sites table. If not then the inspection load will fail.

Note: The process of refreshing the archived works can be automated.

A script to automate the process of refreshing archived works will be shipped:

Exorbase\tma\admin\utl\create_job_to_populate_taw_tas_from_swm. sql

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```
DECLARE
--------------------------------------------------------------------------
--   PVCS Identifiers :-
--
--       PVCS id          : $Header:
//vm_latest/archives/tma/admin/utl/create_job_to_populate_taw_tas_from_swm. sql-arc   3. 0   Jan 08 2008
12:31:16   gjohnson  $
--       Module Name      : $Workfile:   create_job_to_populate_taw_tas_from_swm. sql  $
--       Date into PVCS   : $Date:   Jan 08 2008 12:31:16  $
--       Date fetched Out : $Modtime:   Jan 08 2008 12:30:56  $
--       Version          : $Revision:   3. 0  $
--       Based on SCCS version :
--
--
-- Kick off a refresh of TMA_ARCHIVED_WORKS and TMA_ARCHIVED_SITES
-- based on data in Streetworks Manager tables every 30 minutes
--
--------------------------------------------------------------------------
 l_job_id pls_integer ;
BEGIN
 nm3dbms_job. make_sure_processes_available;
 dbms_job. submit( job => l_job_id
                ,what => 'begin
                           tma_inspections. populate_taw_tas_from_swm;
                         end;'
                ,interval   => 'SYSDATE+30/1440 ' ) ;
 commit;
END;
/
```

By default this will run every 30 minutes. If this needs to be run more often then the line

```
,interval   => 'SYSDATE+30/1440 ' ) ;
```

needs to be changed – ie if every 15 minutes then change it to

```
,interval   => 'SYSDATE+15/1440 ' ) ;
```


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3.5 Lane Rental (Interim Solution)

'Lane Rental' legislation is to be implemented in April 2012 for TfL managed streets in order to encourage Works promoters to avoid particular times for street occupation.

This specification is for the interim solution which:

- Allows TfL to trial functionality prior to the definition of the full requirements for managing the 'Lane Rental' legislation.
- Provides a limited amount of additional functionality that all TMA customers could use.

The mechanism to be used to define the 'Lane Rental' areas will be by the use of the Type 63 special designation code. The existing Code 16 'Strategic Route' is expected to be used.

As some 'Lane Rental' areas are expected to have different limitations at different times of the day it is expected that the extent of the areas will have to be defined for separate carriageways of dual carriageways that share the same NSG USRN.

Each defined 'Lane Rental' area will have an associated 'Charge Band'. The maximum charge that is expected to be permitted under 'Lane Rental' is £2,500 per 'Calendar Day' (*i.e* , not Working Day). Some streets will have more than one 'lane rental' area and more than one 'Charge Band'.

There is no provision under the existing ASD Type 63 to indicate the 'Charge Band' other than in free text. Free text description will be the mechanism adopted for the interim solution prior to the full requirements being identified.

3.5.1 Solution

To meet the requirements stated above, it has been decided that a new Category D type inspection will be created; namely:

- Category D – Ad-Hoc
- This new category of inspection can only be defined as an 'Investigatory' inspection
- The outcomes for this inspection will be 'Promoter on Site' or 'No Promoter on Site'
- The status codes will be 'Yes' and 'No'
- The inspection category items will be:
  43 – Working in Designated Criteria
  44 – Working at Designated Time
  45 – Working in Footway
  46 – Working in Carriageway
  47 – Working in Verge
- The associated item status codes will be 'Unknown', 'Unseen', 'Yes' or 'No'.

The inspection scheduler will be subject to user entered criteria for an individual organisation (*i.e.*, an 'Inspection Profile' will be created for each organisation for an 'Inspection Year').

Overall, the selection criteria for an 'Inspection Profile' will include:

- One or more 'Works Categories'
- One or more 'Phase Activity Types'
- One or more 'Charge Categories'
- One or more words, which if found in the works description result in the works being excluded from the schedule
- One or more 'Charge Bands'
- One of more 'Street Designations'
- The scheduler will use the 'Estimated' or 'Actual' start date and 'Estimated' end date in scheduling these inspections as it is important to schedule the inspection if the Works might have started or be in progress (As

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the ‘Actual Start’ (0400) and ‘Works Stop’ (0600) notices can arrive a ‘Working Day’ after the Works has started or finished).

- Only Works where the ‘Schedulable Flag’ is set to ’Y’ will be included.
- An inspection ‘Rule Set’ will be associated with the ‘Category D’ profile so scheduled inspections will be divided amongst the inspectors on the rule set.
- There will be No follow-up inspections created as a result of Category D Ad_Hoc inspection.

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4 Web Services

This chapter describes the forms and processes used for web services in *TMA by Exor*. They are the following forms:

- Monitor Web Service Transactions – TMA3000
- Send OD Data – TMA3030

The form descriptions provide you with detailed information about each TMA Works form in *TMA by Exor*, including:

- an overall description of the form
- a detailed explanation of each field, including available features (such as List of Values), default values and other characteristics
- helpful information for using the form

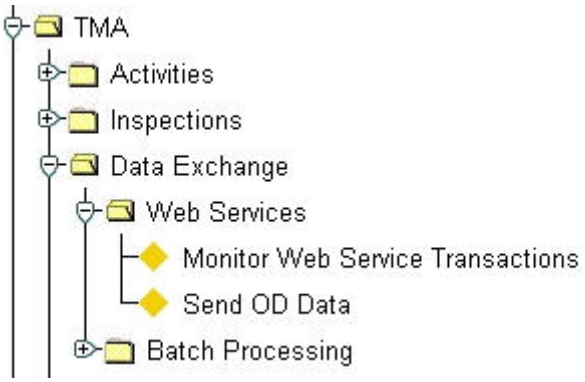

Figure 21 – Monitor Web Service Transactions Menu

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4.1 Monitor Web Service Transactions – TMA3000

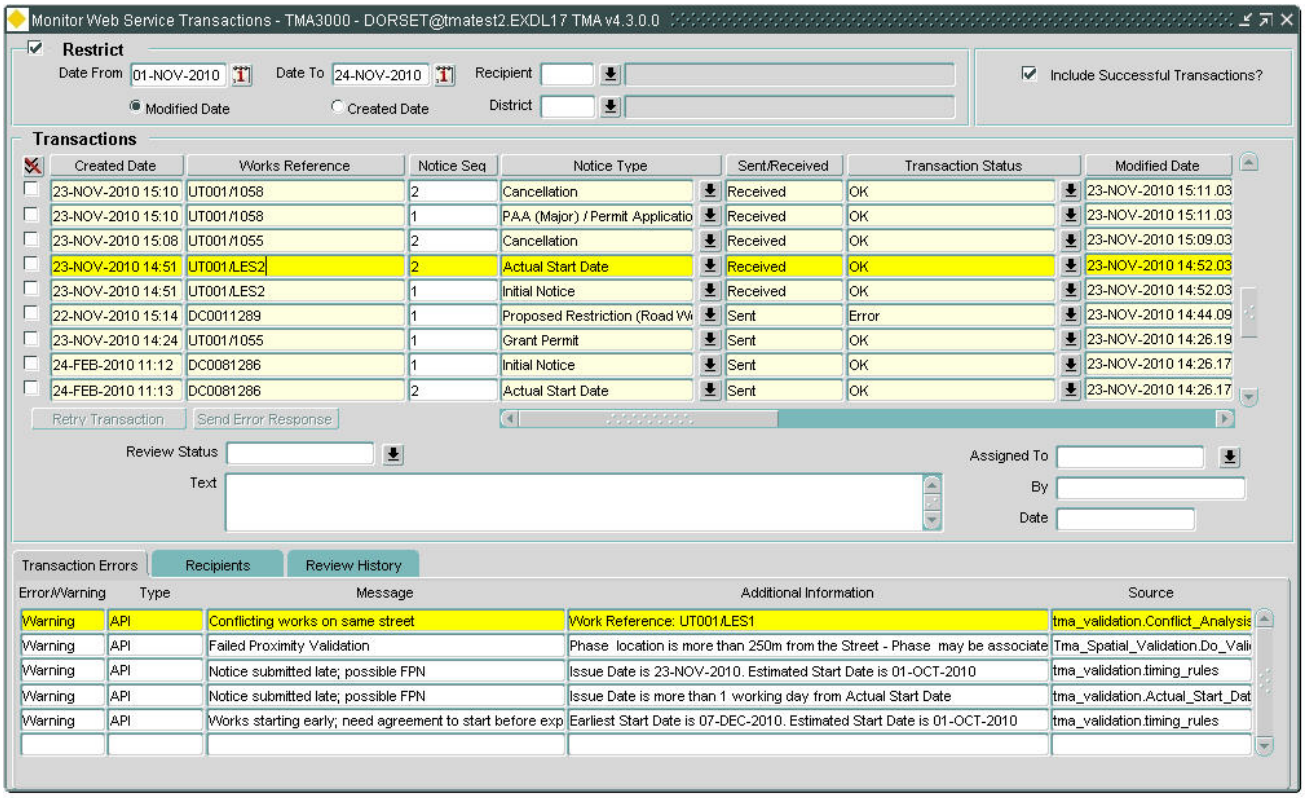
Monitor Web Service Transactions - TMA3000 - DORSET@tmatest2.EXDL17 TMA v4.3.0.0
Restrict
Date From 01-NOV-2010
Date To 24-NOV-2010
Recipient
District
Modified Date
Created Date
Include Successful Transactions?
Transactions
Created Date | Works Reference | Notice Seq | Notice Type | Sent/Received | Transaction Status | Modified Date
23-NOV-2010 15:10 | UT001/1058 | 2 | Cancellation | Received | OK | 23-NOV-2010 15:11.03
23-NOV-2010 15:10 | UT001/1058 | 1 | PAA (Major) / Permit Applicatio | Received | OK | 23-NOV-2010 15:11.03
23-NOV-2010 15:08 | UT001/1055 | 2 | Cancellation | Received | OK | 23-NOV-2010 15:09.03
23-NOV-2010 14:51 | UT001/LES2 | 2 | Actual Start Date | Received | OK | 23-NOV-2010 14:52.03
23-NOV-2010 14:51 | UT001/LES2 | 1 | Initial Notice | Received | OK | 23-NOV-2010 14:52.03
22-NOV-2010 15:14 | DC0011289 | 1 | Proposed Restriction (Road W | Sent | Error | 23-NOV-2010 14:44.09
23-NOV-2010 14:24 | UT001/1055 | 1 | Grant Permit | Sent | OK | 23-NOV-2010 14:26.19
24-FEB-2010 11:12 | DC0081286 | 1 | Initial Notice | Sent | OK | 23-NOV-2010 14:26.17
24-FEB-2010 11:13 | DC0081286 | 2 | Actual Start Date | Sent | OK | 23-NOV-2010 14:26.17
Retry Transaction
Send Error Response
Review Status
Text
Assigned To
By
Date
Transaction Errors
Recipients
Review History
Error/Warning | Type | Message | Additional Information | Source
Warning | API | Conflicting works on same street | Work Reference: UT001/LES1 | tma_validation.Conflict_Analysis
Warning | API | Failed Proximity Validation | Phase location is more than 250m from the Street - Phase may be associate | Tma_Spatial_Validation.Do_Vali
Warning | API | Notice submitted late; possible FPN | Issue Date is 23-NOV-2010. Estimated Start Date is 01-OCT-2010 | tma_validation.timing_rules
Warning | API | Notice submitted late; possible FPN | Issue Date is more than 1 working day from Actual Start Date | tma_validation.Actual_Start_Dat
Warning | API | Works starting early; need agreement to start before exp | Earliest Start Date is 07-DEC-2010. Estimated Start Date is 01-OCT-2010 | tma_validation.timing_rules

Figure 22 – Monitor Web Service Transactions

4.1.1 General Information

The *Monitor Web Service Transaction* form is used to monitor notices being sent/received.

Date ranges can be specified on the first section of the form. When the *Restrict* checkbox is selected the run query function will return all notices within the specified date range. When the restrict box is unselected a record of all notices in the system will be returned.

Records returned can be restricted by recipient organisation and district.

The *Include Successful Transactions?* checkbox can be used additionally to restrict transactions queried by including or excluding successful transactions.

If there is a problem loading a transaction then the 'Status' will be set to 'Pending'. Pending transactions will be retried until the timeout period ends. Once the timeout period ends then the transaction will attempt to be processed, possibly resulting in a timeout error.

If Product Option HOLDPNDING is set to 'Y' pending transactions will be held back if a previous transaction has not arrived or been successfully processed.

Product Option PNDNGTIME will determine, in minutes, how long a pending transaction will be held for.

If BPEL has a problem sending a transaction, Product Option BPELTMOUT will determine the maximum time allowed for retrying before timing out. After this time the transaction will fail with a status of 'Error' and a timeout error message. This is relevant only when sending transactions.

This functionality will minimise notice out of sequence errors.

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For example:

If a start notice is received before the initial notice then the start notice transaction will be set to ‘Pending’. If within the timeout period the initial notice is received then the pending start notice will be processed after the initial notice.

Product Option RECTRANSQ, when set, will act like a drip-feed if a backlog of receive transactions has arisen. If set to null then all applicable transactions will be processed in one go. However, if for example, the value is set to 100, then only the first 100 transactions will be processed in that iteration.

When the Monitor Transaction form is opened a check will be performed to confirm that the correct processes for receiving and sending transactions have been created and are active.

If the process is expected to exist and is either missing or is not ‘Running’ or ‘Scheduled’ the following message will appear.

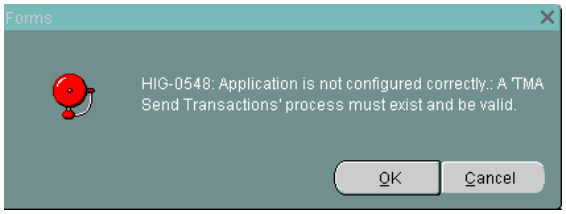
Forms
HIG-0548: Application is not configured correctly.: A 'TMA Send Transactions' process must exist and be valid.
OK
Cancel

Figure 23 - Message

When a notice/transaction fails sending to a copy recipient the ‘Transaction Status’ will be set to ‘Copy Recipient Fail’. Further notices for the works/phase can continue to be issued.

4.1.2 Sorting Results

Results within the form may be sorted by any of the displayed fields by pressing the field name (column heading) which are also ‘Sort’ buttons. The first time a heading is pressed the records are sorted in ascending order. If pressed again the records within the column will be sorted in descending order. A ‘carat’ (^) symbol or lower case ‘v’ is displayed adjacent to the column name to indicate that the data has been sorted in ascending or descending order respectively as shown below.

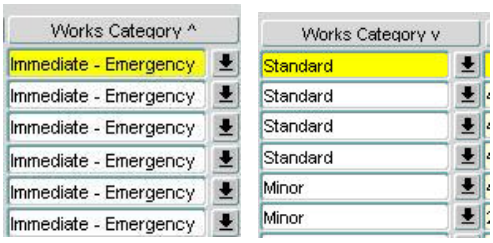

Figure 24 - Sort

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4.1.3 Restrict

Figure 25 - Restrict

The notice transactions viewed can be restricted by any of the following fields. The 'Restrict' checkbox has to be ticked.

Date From	***Optional***	***Date***

Enter the date from which to return transaction records.

Date To	***Optional***	***Date***

Enter the date to which to return transaction records.

Recipient	***Optional***	***Date***

Enter the recipient organisation to restrict the return of transaction records.

District	***Optional***	***Date***

Enter the recipient district to restrict the return of transaction records.

Modified Date	***Optional***	***Date***

Check this box if the dates entered apply to the modified date of the transaction.

Created Date	***Checkbox***

Check this box if the dates entered apply to the created date of the transaction.

Include Successful Transactions?	***Checkbox***

Check this box if the records returned are to include successful transactions.

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4.1.4 Transactions

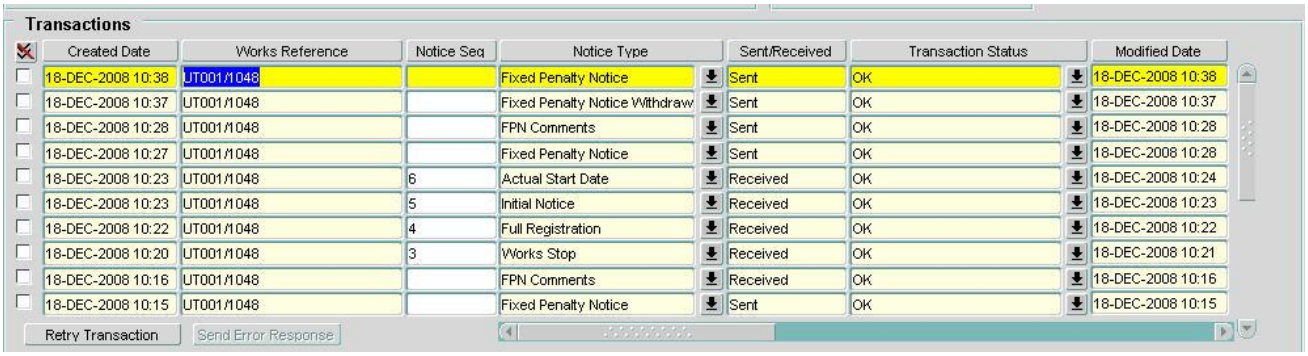
Transactions
Created Date
Works Reference
Notice Seq
Notice Type
Sent/Received
Transaction Status
Modified Date
18-DEC-2008 10:38 UT001/1048 Fixed Penalty Notice Sent OK 18-DEC-2008 10:38
18-DEC-2008 10:37 UT001/1048 Fixed Penalty Notice Withdraw Sent OK 18-DEC-2008 10:37
18-DEC-2008 10:28 UT001/1048 FPN Comments Sent OK 18-DEC-2008 10:28
18-DEC-2008 10:27 UT001/1048 Fixed Penalty Notice Sent OK 18-DEC-2008 10:28
18-DEC-2008 10:23 UT001/1048 6 Actual Start Date Received OK 18-DEC-2008 10:24
18-DEC-2008 10:23 UT001/1048 5 Initial Notice Received OK 18-DEC-2008 10:23
18-DEC-2008 10:22 UT001/1048 4 Full Registration Received OK 18-DEC-2008 10:22
18-DEC-2008 10:20 UT001/1048 3 Works Stop Received OK 18-DEC-2008 10:21
18-DEC-2008 10:16 UT001/1048 FPN Comments Received OK 18-DEC-2008 10:16
18-DEC-2008 10:15 UT001/1048 Fixed Penalty Notice Sent OK 18-DEC-2008 10:15
Retry Transaction
Send Error Response

Figure 26 - Transactions

TMA notices are transferred between organisations via Web Services (transactions).

Each transaction record has a checkbox against it that enables the selection of multiple transactions that require action. This could be [Retry Transaction], [Send Error Response], [Retry Forward Transaction] or [Set Forward Status Ignore].

Created Date ***Display Only***

The created date of the transaction will be displayed. If the transaction has been re-processed using the [Retry Transaction] button this will be shown in the modified date (*i.e.,* the date the notice was re-processed).

Works Reference ***Display Only***

The works reference will be displayed.

Notice Seq ***Display Only***

The transaction sequence of the notice sent/received will be displayed.

Notice Type ***Display Only*** ***List***

The notice type of the works will be displayed.

Sent/Received ***Display Only***

This field will show whether the notice is to be sent or if it has been received.

Transaction Status ***Display Only*** ***List***

This field will show the transaction status of the works.

Transaction status codes will have been defined in form *Domains – HIG9120* under the option *TRANSACTION_STATUS.*

Modified Date ***Display Only***

The modified date of the transaction will be displayed. If the transaction has been re-processed using the [**Retry Transaction**] button this date will be shown. (*i.e.,* the date the notice was re-processed).

Use the scroll bar to display these columns:

Works Category ***Display Only*** ***List***

The works category of the works will be displayed.

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Processing Seq ***Display Only***

This field will show the order the transactions were processed.

Send Org ***Display Only***

This field will display the sending organisation of the transaction.

Send Dist ***Display Only***

This field will display the sending operational district of the transaction.

USRN ***Display Only***

The USRN of the street on which the work is to take place will be displayed.

Status Context ***Display Only***

This field will display information, for example, information regarding the waiting for arrival of another notice (*i.e.*, a notice has been received out of sequence).

Timeout Deadline ***Display Only*** ***Calendar***

This field will display the date and time up to which a pending transaction will be reprocessed before the transaction status is set to 'Error'.

The calendar button can be used to extend the deadline.

Forward Status ***Display Only***

The forward status of the transaction will be displayed.

This field will be available only if the **Product Option – FWD_NOTICE** is set to *Y*.

Note: If the Transaction Status is set to 'Rejected by Web Services' it will have failed the XSD validation. The user will not be able to retry these transactions.

The [**Retry Transaction**] button will allow failed transactions to be reprocessed. The transaction will go only to those organisations that have not successfully received it on a previous occasion. It will be active only if the 'Transaction Status' is 'Pending Send' or 'OK'.

Figure 27 – Retry Transaction button

A transaction at a status of 'Pending Send' can be re-tried to allow the user to bypass the hold that has been placed on the transaction whilst a prior transaction is at a status or 'Error'.

A transaction at a status of 'OK' can be re-tried to allow the user to re-send a transaction to another organisations system if the original transaction has been lost or misplaced.

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The [**Send Error Response**] button will allow the user to send a response to a transaction received in error. It will be active only if the transaction status is 'Error'.

Figure 28 – Send Error Response button

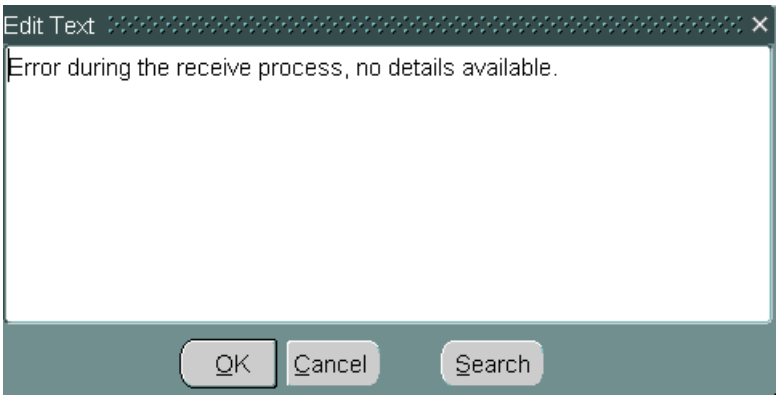

Figure 29 - Transaction Text

For each transaction selected the user will be prompted for text to send in the response. This is defaulted to the error message but can be updated. Select [**OK**] to send a Comment to the sender of the transaction.

The [**Retry Forward Transaction**] button will set the Forward Status to 'Ready to Send' from any other forward status that is set. This is to allow the BPEL process to retry sending the transaction.

Figure 30 – Retry Forward Transaction button

Note: This button will be available only if the **Product Option – FWD_NOTICE** is set to Y.

The [**Set Forward Status**] button will set the Forward Status to 'Ignore' only if the Forward Status is set to 'Error'. This is to prevent the retry job from trying to resend the transaction.

Figure 31 – Set Forward Status Ignore button

Note: This button will be available only if the **Product Option – FWD_NOTICE** is set to Y.

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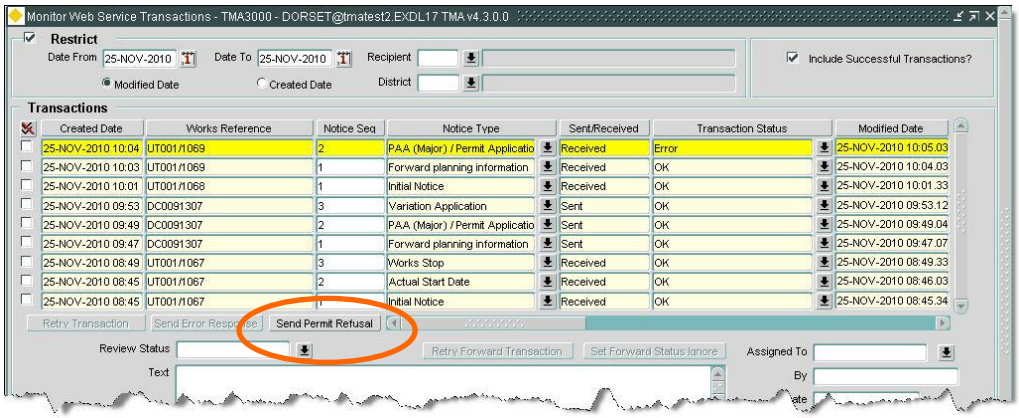
Monitor Web Service Transactions - TMA3000 - DORSET@tmatest2.EXDL17 TMA v4.3.0.0
Restrict
Date From 25-NOV-2010
Date To 25-NOV-2010
Recipient
District
Modified Date
Created Date
Include Successful Transactions?
Transactions
Created Date
Works Reference
Notice Seq
Notice Type
Sent/Received
Transaction Status
Modified Date
25-NOV-2010 10:04 UT001/1069 2 PAA (Major) / Permit Applicatio Received Error 25-NOV-2010 10:05.03
25-NOV-2010 10:03 UT001/1069 1 Forward planning information Received OK 25-NOV-2010 10:04.03
25-NOV-2010 10:01 UT001/1068 1 Initial Notice Received OK 25-NOV-2010 10:01.33
25-NOV-2010 09:53 DC0091307 3 Variation Application Sent OK 25-NOV-2010 09:53.12
25-NOV-2010 09:49 DC0091307 2 PAA (Major) / Permit Applicatio Sent OK 25-NOV-2010 09:49.04
25-NOV-2010 09:47 DC0091307 1 Forward planning information Sent OK 25-NOV-2010 09:47.07
25-NOV-2010 08:49 UT001/1067 3 Works Stop Received OK 25-NOV-2010 08:49.33
25-NOV-2010 08:45 UT001/1067 2 Actual Start Date Received OK 25-NOV-2010 08:46.03
25-NOV-2010 08:45 UT001/1067 1 Initial Notice Received OK 25-NOV-2010 08:45.34
Retry Transaction
Send Error Response
Send Permit Refusal
Review Status
Retry Forward Transaction
Set Forward Status Ignore
Assigned To
Text
By

Figure 32 - Send Permit Refusal button

The [**Send Permit Refusal**] button will allow the user to refuse a Permit that has been received resulting in a Transaction with a status of 'Error'.

Figure 33 – Send Permit Refusal button

The Permit transactions that can be refused if in error are:

- PAA(Major)/Permit Application (Non-Major)
- Permit Application
- Variation Application
- Duration Variation Application

The button will be visible when the current transaction is:

- Of a Notice Type listed above
- It has been received in error
- A refusal has not yet been sent

When the button is pressed a Refusal Notice (1613) will be sent back automatically to the sender of the Permit notice.

If the Street Authority refuses a Permit using this functionality then it will be expected that the Street Authority contact the Promoter to explain that the receipt of the initial Permit Application (0210) notice failed.

The Promoter must cancel the Works that have been refused and create a new Works with another Permit Application.

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4.1.5 Review

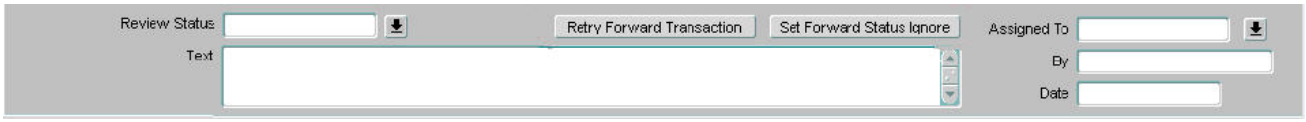

Figure 34 – Review

The review part of the form allows each transaction to be reviewed. The task of reviewing the transaction can be assigned to a particular user.

Status	***Optional***	***List***

Enter the review status for the selected transaction.

Review status codes can be added using form *Domains – HIG9120* under the option TRANS_REVIEWSTATUS.

Text	***Optional***

Enter the review comments for the selected transaction.

Standard text may be defined in form *Standard Text Maintenance – HIG4010* and assigned to a user in form *Standard Text Usage – HIG4020*. (Refer to the General System Administration manual for further details)

If standard text has been set up for this field right click with the mouse and select the [**Standard Text**] option.

Figure 35 – Standard Text

This will bring up form *Standard Text – HIG4030* form where the relevant text can be selected.

The content of this picklist is defined on a user by user basis and is controlled by the system administrator.

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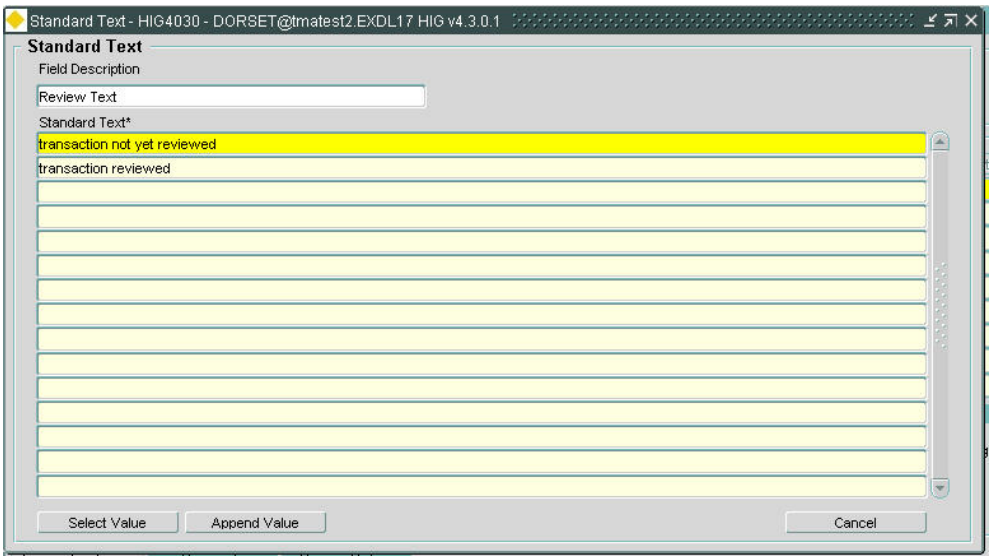

Figure 36 – Standard Text

[Select Value] Will select the selected text and place the text in the current field. Any text already in the field will be overwritten.

[**Append Value**] Will append the selected text to any text that is in the current field providing there is sufficient room remaining in that field.

[**Cancel**] Will cancel the form.

Assigned To ***Optional*** ***List***

Enter the name of the user who is to review the transaction.

By ***Display Only***

The name of the user who has reviewed the transaction or assigned the transaction will be displayed.

Date ***Display Only***

The date the transaction was reviewed or assigned will be displayed.

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4.1.6 Transaction Errors tab

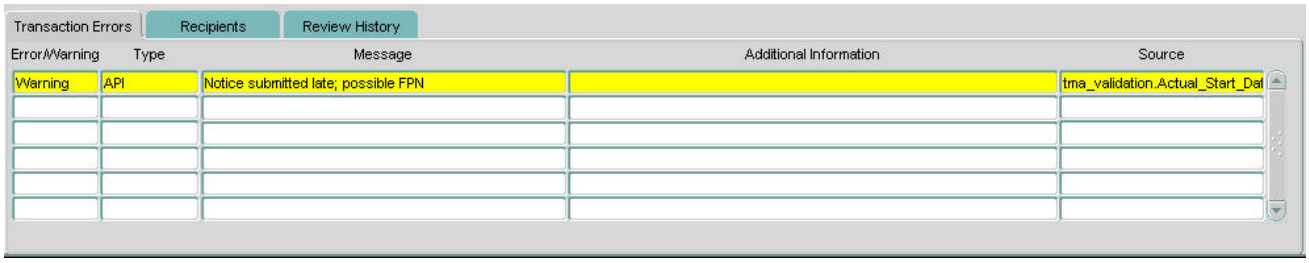

Figure 37 - Transaction Errors

The *Transaction Errors* tab will display any errors associated with the works highlighted in the *Transactions* part of the form.

Error/Warning ***Display Only***

The error or warning of the transaction error will be displayed if applicable.

Type ***Display Only***

The type of the file with the transaction error will be displayed.

Message ***Display Only***

The error message of the transaction error will be displayed.

Additional Information ***Display Only***

Additional information associated with the transaction error will be shown.

Source ***Display Only***

The source of the transaction error will be displayed.

4.1.7 Recipients tab

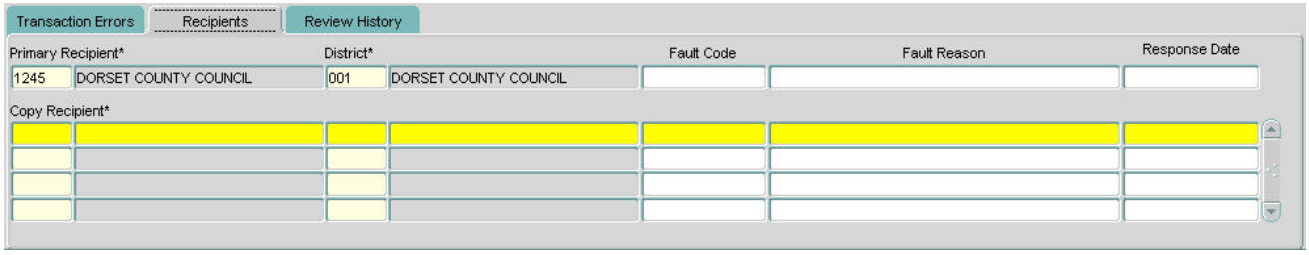

Figure 38 - Recipients

The *Recipients* tab will display the primary and copy recipients of the notice. Errors during the transaction will be detailed for each recipient if applicable.

Primary/Copy Recipient ***Display Only***

The organisation code of the primary and copy (optional) recipient of the transaction will be displayed.

A description will be displayed in the adjacent field.

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District ***Display Only***

The operational district code of the primary and copy (optional) recipient of the transaction will be displayed. A description will be displayed in the adjacent field.

Fault Code ***Display Only***

The fault code of the transaction error will be displayed.

Fault Reason ***Display Only***

The fault reason of the transaction will be displayed.

Response Date ***Display Only***

Details of the response date and time from the receiving web server will be displayed.

4.1.8 Review History tab

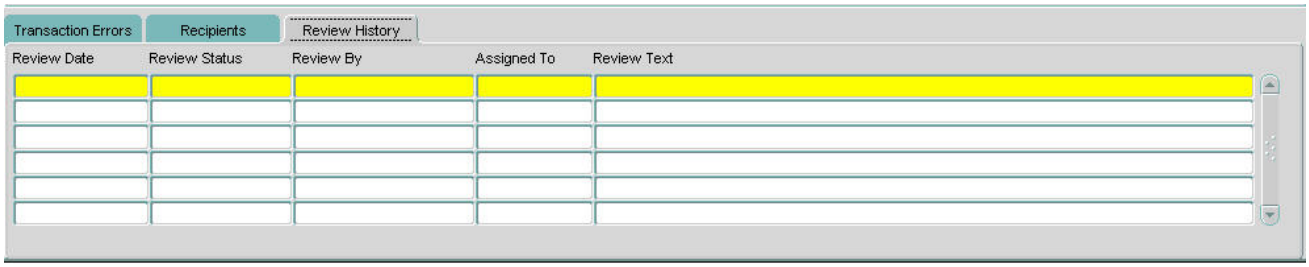

Figure 39 - Review History

The *Review History* tab will display details of all reviews carried out on the selected transaction.

Review Date ***Display Only***

The date of the review will be displayed.

Review Status ***Display Only***

The review status of the review will be displayed.

Review By ***Display Only***

The name of the user who carried out the review will be displayed.

Assigned To ***Display Only***

The name of the user who has been assigned to carry out the review will be displayed.

Review Text ***Display Only***

Details of the comments associated with the review will be displayed.

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4.1.9 Links

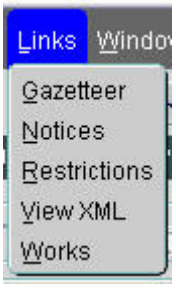

Figure 40 - Links

There are a number of forms that can be accessed from the Monitor Web Services Transactions form. This is done using the 'Links' menu on the top of the form.

To view details of the street associated with the works select the 'Gazetteer' option on the 'Links' menu.

This will call the *Gazetteer – NSG0010* module.

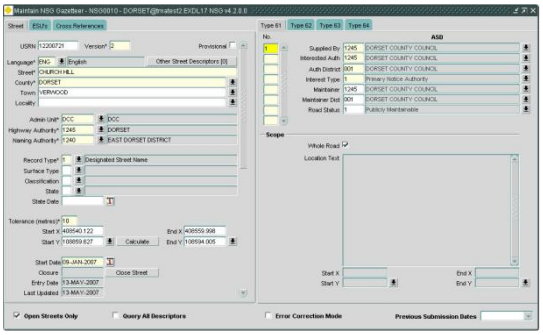

Figure 41 - Gazetteer

Full details of the street associated with the selected works will be shown.

To view details the notice for the works, highlight the transaction and select the 'Notices' option on the 'Links' menu.

This will call the *View Notice – TMA1810* module.

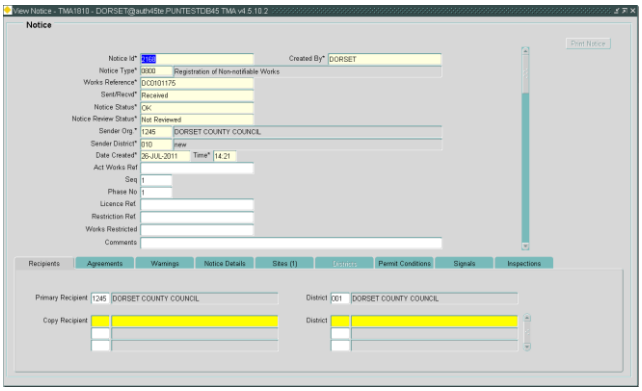

Figure 42 - View Notice

Details of the selected notice will be shown.

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To view details of the restrictions notice select the 'Restrictions' option on the 'Links' menu.
This will call the *Restrictions – TMA1100* module.

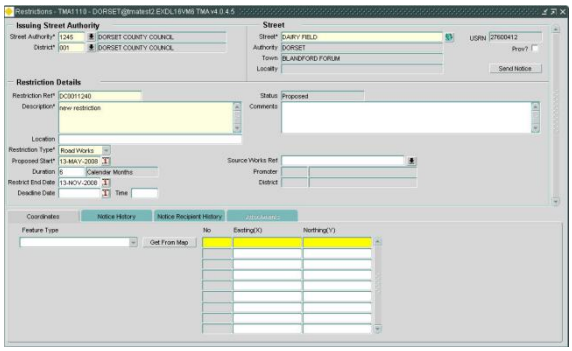

Figure 43 - Restrictions

Full restriction details will be shown.

To view details of the XML transaction of the works select the 'View XML' option on the 'Links' menu.

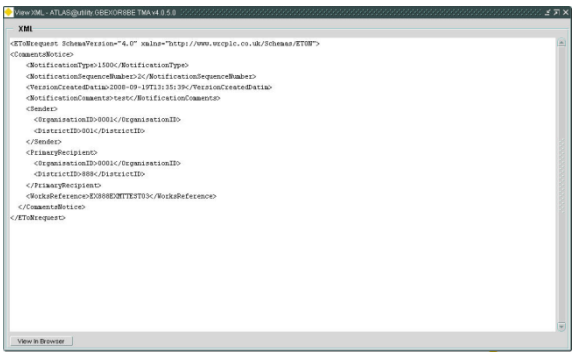

Figure 44 - View XML

Full details of the XML transaction will be shown.

Note: When receiving a notice, if the batch job has not run then the XML file will not have been transformed into data. To view details of the notice use the [View in Browser] button.

For example; the notice failed to load because the promoter details are not registered in the form NSG0110 – Organisations and Districts.

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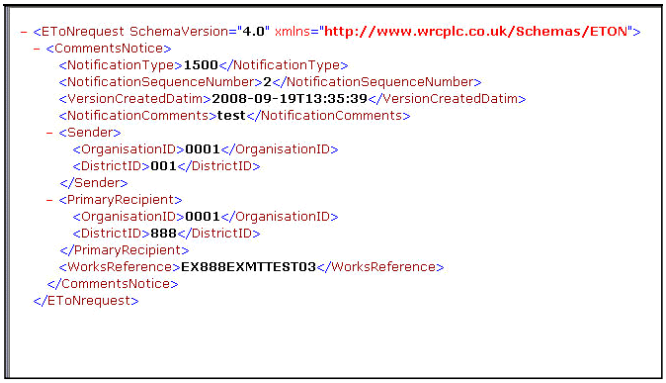

Figure 45 - View in Browser

To view details of the works select the 'Works' option on the 'Links' menu.
This will call the *Works – TMA100* module.

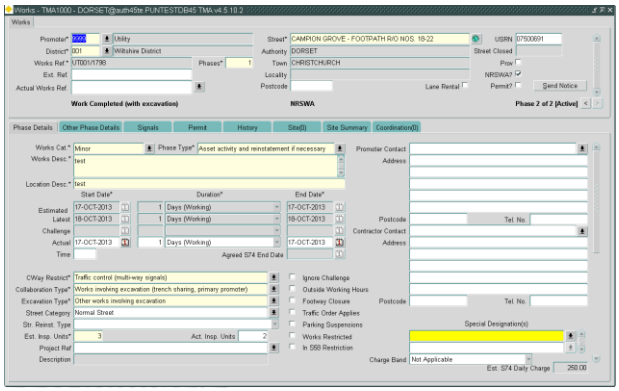

Figure 46 - Works

Details of the selected works will be shown.

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4.2 Send OD Data – TMA3030

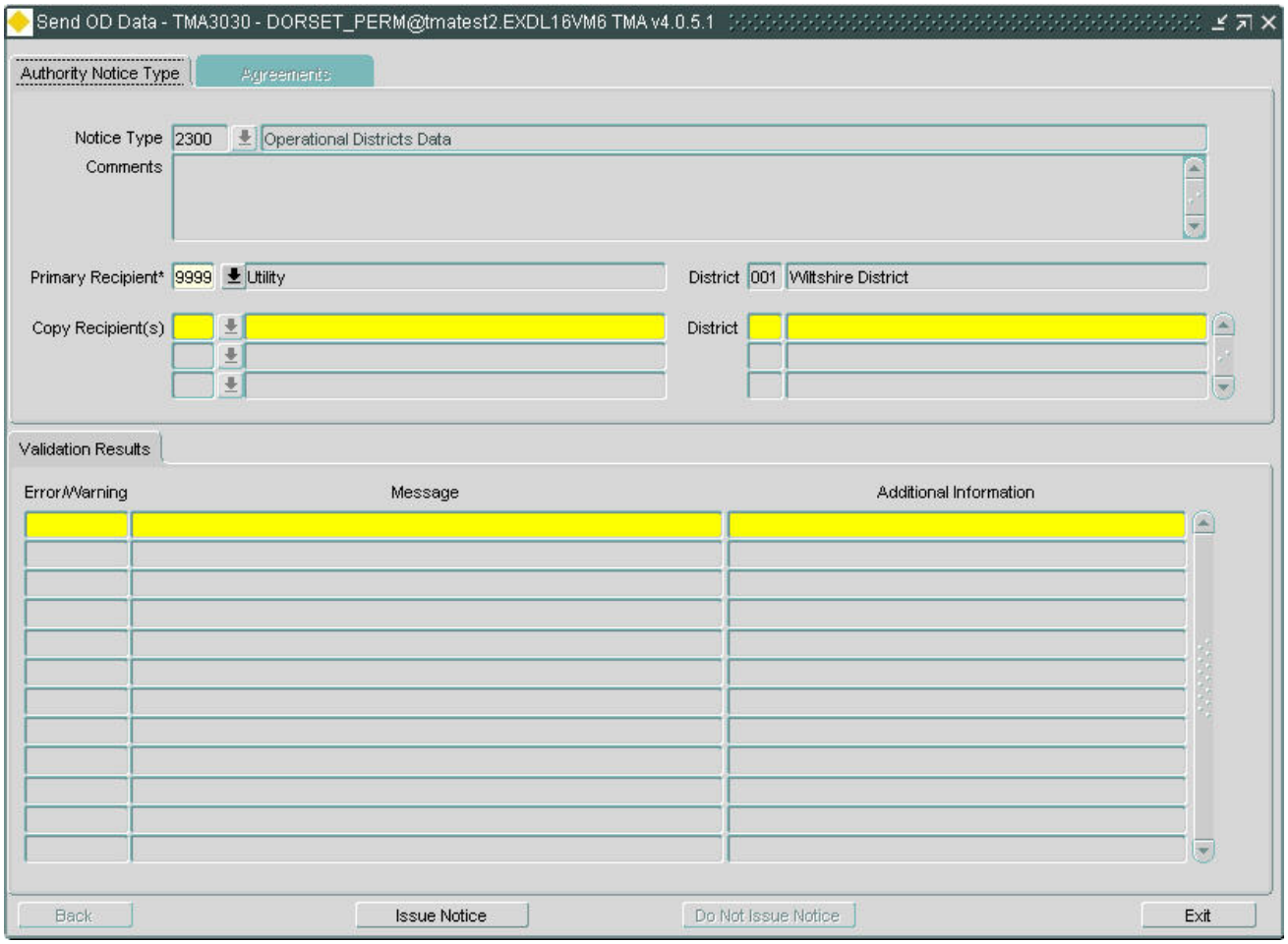

Figure 47 - Send OD Data

4.2.1 General Information

The 'Send OD Data' form is used to send operational district data to a specified recipient. A validation is performed on the file and if, for instance, there are any mandatory fields missing, the details will be displayed in the 'Validation Results' tab.

Primary Recipient	***Mandatory***	***List***

Enter the recipient of the operational district file.

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5 Batch Processing, Inspections

Figure 48 – Batch Processing Menu

This chapter describes the forms and processes used for batch processing inspections in *TMA by Exor*. They are the following forms:

- Inspection Download – TMA5500
- Inspection Upload – TMA5600
- Automatic Inspection Upload – TMA5610
- Inspection Batch File Summary – TMA5510
- Inspection Upload Transaction Summary – TMA5620

The form descriptions provide you with detailed information about each TMA Works form in *TMA by Exor*, including:

- an overall description of the form
- a detailed explanation of each field, including available features (such as List of Values), default values and other characteristics
- helpful information for using the form

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5.1 Inspection Download – TMA5500

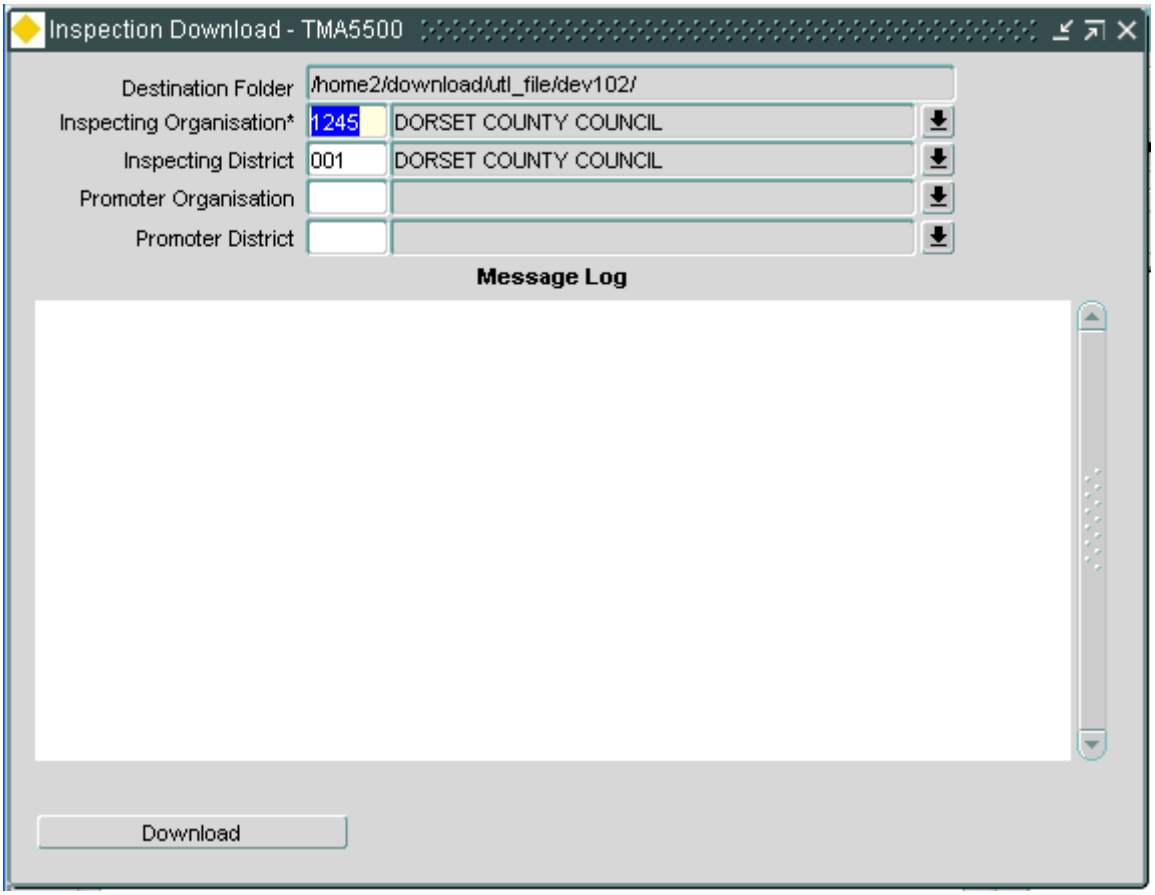

Figure 49 - Inspection Download

5.1.1 General Information

This form is used to manually download (export data to a file) inspections for a given organisation and district. The destination folder will have been defined in form *Directories – HIG1895* under the option TMA_INSP_EXPORT_DIRECTORY' an example of this form is shown in Figure 51.

5.1.2 Inspection Download

Destination Folder ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_INSP_EXPORT_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - INSPEXP**.

Inspecting Organisation ***Mandatory*** ***List***

Enter the organisation carrying out the inspections.

Inspecting District ***Mandatory*** ***List***

Enter the organisational district of the organisation carrying out the inspections.

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Promoter Organisation	***Optional***	***List***

Enter the organisation that owns the works to be inspected.

Promoter District	***Optional***

Enter the organisational district of the organisation to be inspected.

Message Log	***Display Only***

This field will detail the download process and list the files produced as a result of the download operation.
The [**Download**] button will start the manual inspection download.

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5.2 Inspection Upload – TMA5600

Figure 50 - Inspection Upload

5.2.1 General Information

This form is used to manually upload (load data into the TMA system) inspections.

Existing TMA Mobile inspection software allows an inspector to associate an inspection (or inspection item) with a file on the mobile device. This could be, for example, a picture or video).

Both inspection batch files and associated documents can be downloaded from the mobile device. However, the TMA upload functionality processes only inspection batch files.

The TMA inspection loader plugs into the Document Bundle Loader to facilitate linking a document to an inspection.

Product Option – INSPDOCTYP is used to define the document type used to support TMA inspection documents.

Product Option – INSPDOCLOC is used to define the document location name used to support TMA inspection documents.

The Import, Pass and Fail directories will have been defined in form *Directories – HIG1895* under the options 'TMA_INSP_IMPORT_DIRECTORY' 'TMA_INSP_PASS_DIRECTORY' and 'TMA_INSP_FAIL_DIRECTORY'.

The import document directory will have been defined under the option 'TMA_INSP_IMPORT_DOCS_DIRECTORY. An example of this form is shown in Figure 51.

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5.2.2 Directories

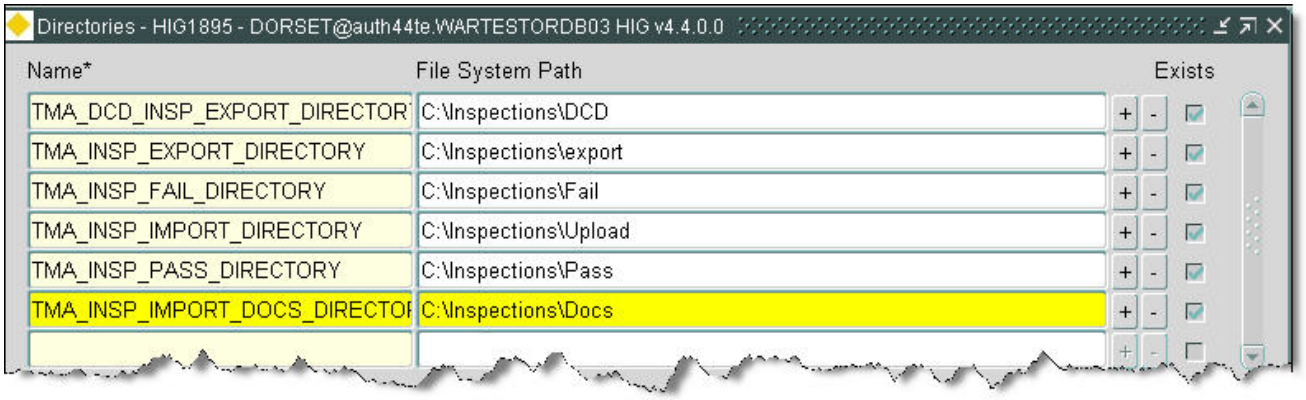

Figure 51 - Directories

Import Directory ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_INSP_IMPORT_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - INSPIMP**.

Pass Directory ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_INSP_PASS_DIRECTORY.

Note: the name of the directory must correspond with the value in Product Option/User Option INSPPASS.

Fail Directory ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_INSP_FAIL_DIRECTORY.

Note: The name of the directory must correspond with the value in Product Option/User Option INSPFAIL.

Documents Directory ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_INSP_IMPORT_DOCS_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - INSPDOCS**.

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5.2.3 File Selection

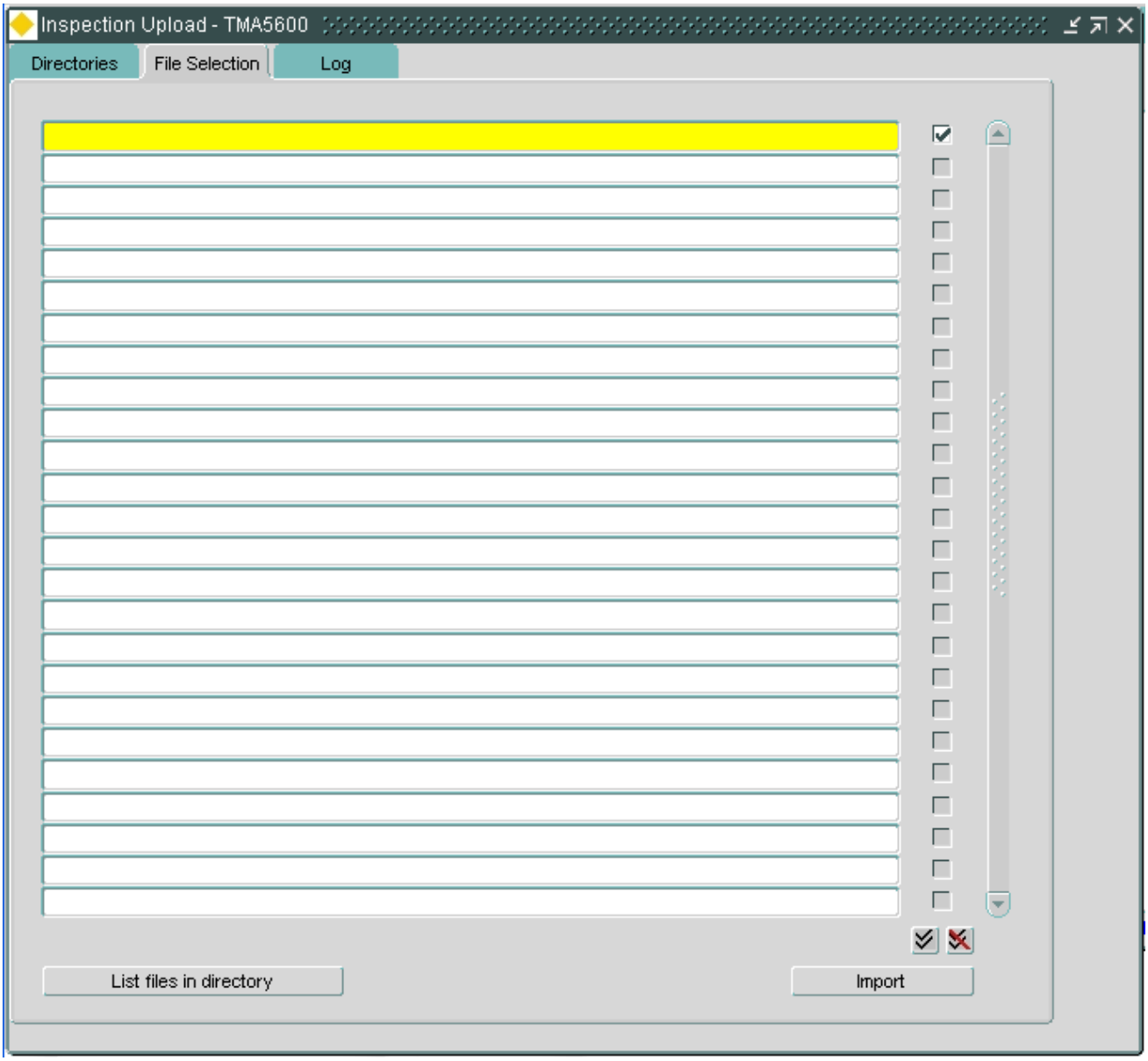

Figure 52 - File Selection

The *File Selection* tab allows the user to select files individually by using the tick box or to select all files by using the [**Select All**] button on the bottom of the form you can also unselect all by using the [**Deselect All**] button .
Select the [**List Files in Directory**] button to give a complete list of available to load.
Once the required files have been selected then the [**Import**] button can be pressed to start the load process.

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5.2.4 Message Log

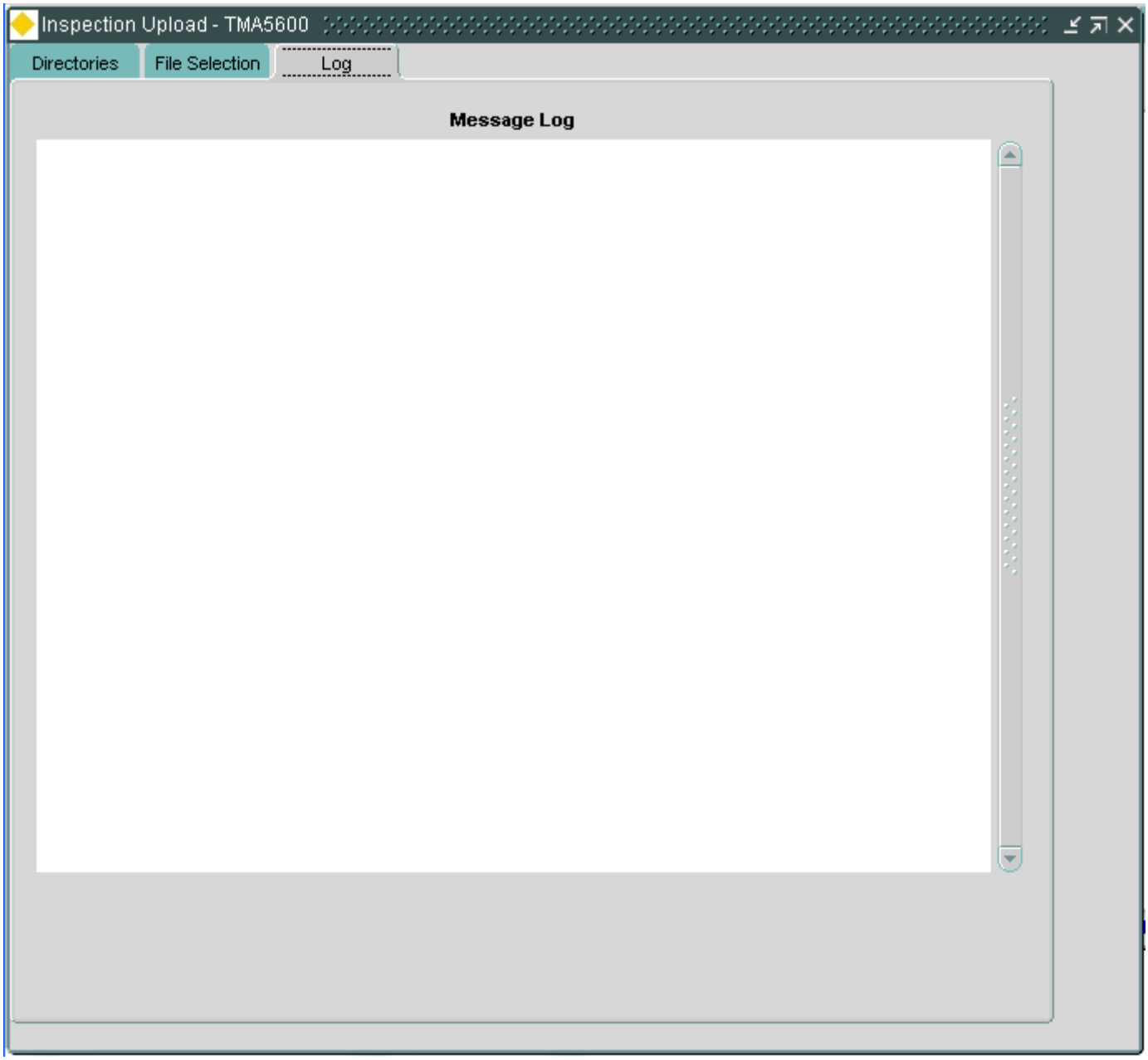

Figure 53 - Log

The Log tab will show the actions taken during the import process.
This will list the files processed and whether they have been moved into the [**Pass**] directory or the [**Fail**] directory.
If documents have been associated to the inspection it will show whether they have been processed successfully.

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5.3 Automatic Inspection Upload – TMA5610

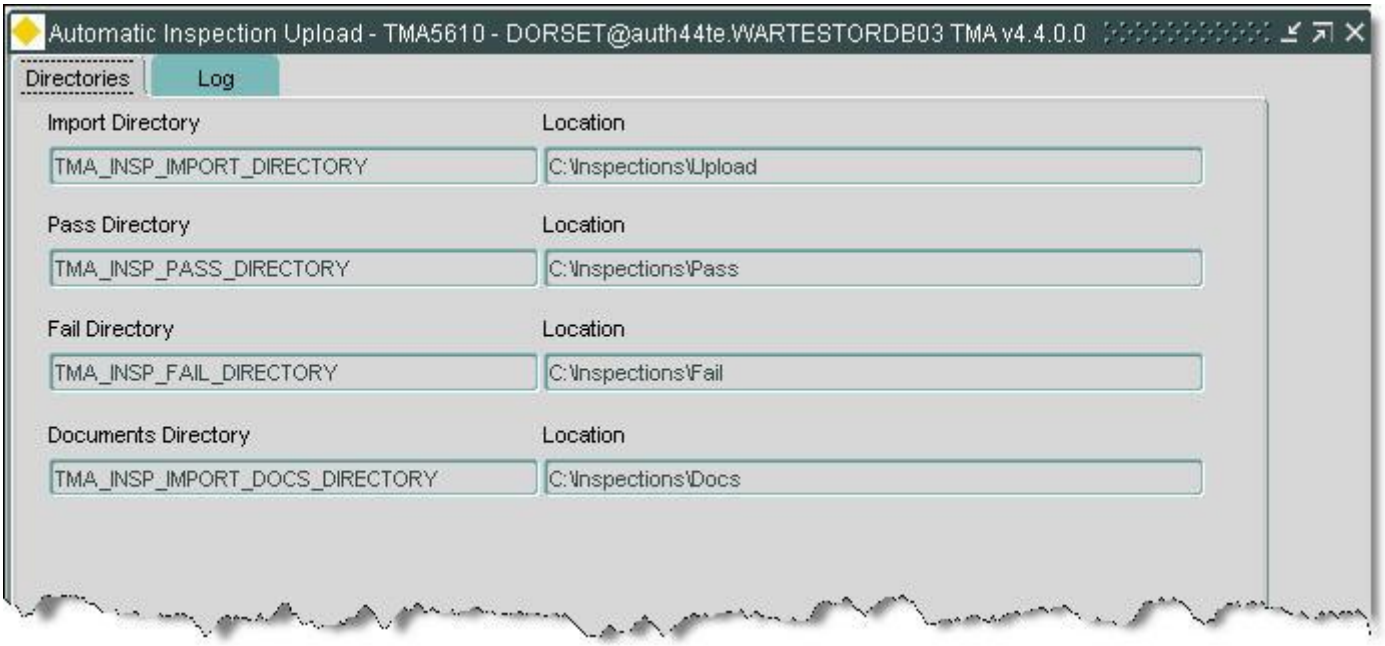

Figure 54 - Automatic Inspection Upload

5.3.1 General Information

This form is used to automatically upload (load data into the TMA system) inspections.

Existing TMA Mobile inspection software allows an inspector to associate an inspection (or inspection item) with a file on the mobile device. This could be, for example, a picture or video).

Both inspection batch files and associated documents can be downloaded from the mobile device. However, the TMA upload functionality processes only inspection batch files.

The TMA inspection loader plugs into the Document Bundle Loader to facilitate linking a document to an inspection.

Product Option – INSPDOCTYP is used to define the document type used to support TMA inspection documents.

Product Option – INSPDOCLOC is used to define the document location name used to support TMA inspection documents.

The Import, Pass and Fail directories will have been defined in form *Directories – HIG1895* under the options 'TMA_INSP_IMPORT_DIRECTORY' 'TMA_INSP_PASS_DIRECTORY' and 'TMA_INSP_FAIL_DIRECTORY'.

The import document directory will have been defined under the option 'TMA_INSP_IMPORT_DOCS_DIRECTORY.

An example of this form is shown in Figure 51.

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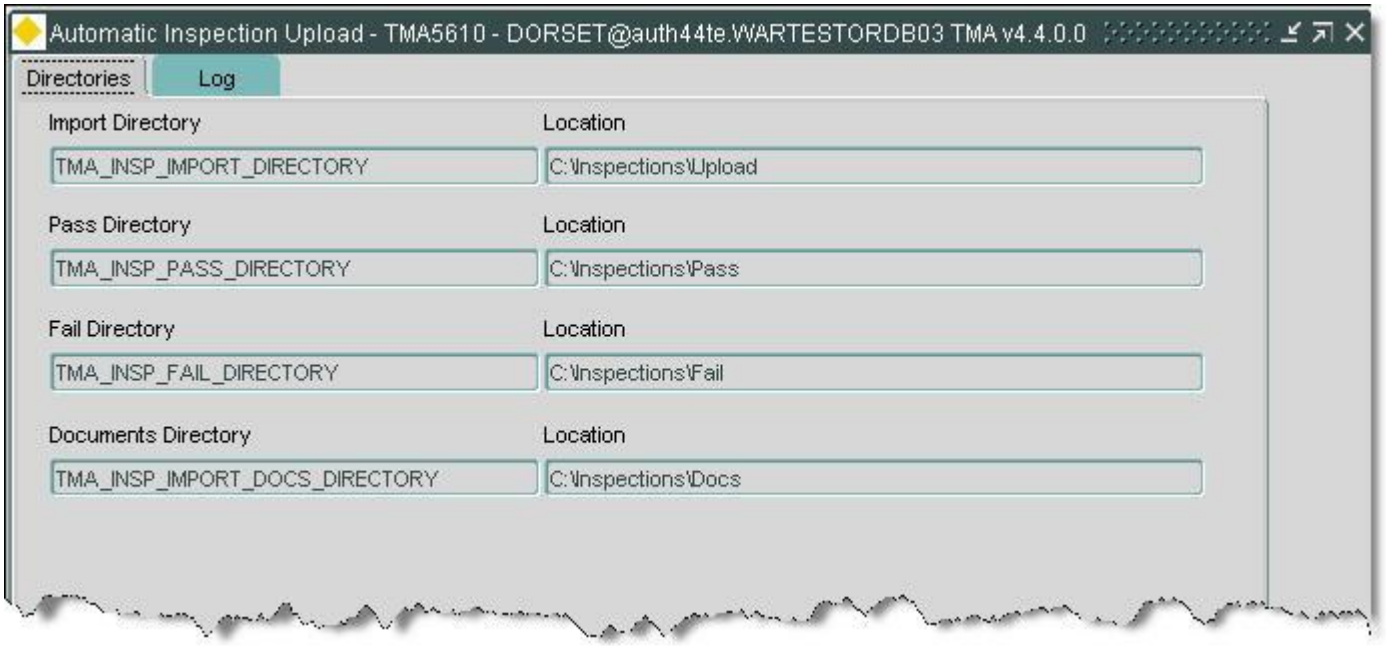

Figure 55 – Automatic Inspection Upload

5.3.2 Directories

Import Directory ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_INSP_IMPORT_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - INSPIMP**.

Pass Directory ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_INSP_PASS_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - INSPPASS**.

Fail Directory ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_INSP_FAIL_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - INSPFAIL**.

Documents Directory ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_INSP_IMPORT_DOCS_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - INSPDOCS**.

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5.3.3 Message Log

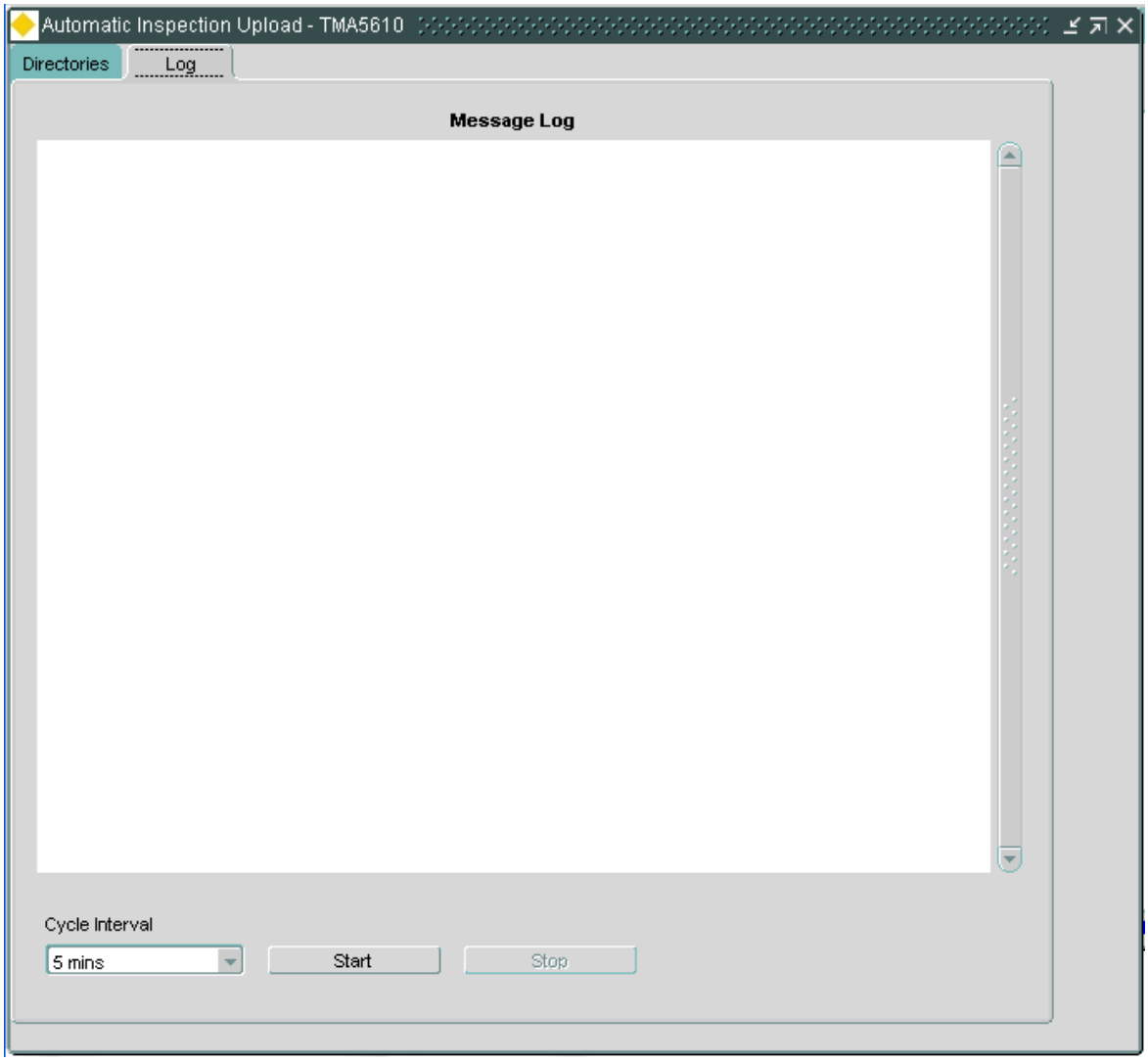

Figure 56 - Log

The Log tab will show the actions taken during the upload process.
This will list the files processed and whether they have been moved into the [**Pass**] directory or the [**Fail**] directory.
If documents have been associated to the inspection it will show whether they have been processed successfully.
The date and time of the next upload cycle will also be shown.

Cycle Interval	***Optional***	***List***

Enter the interval that the system will use to load available inspection files.
Press the [Start] button to start the automatic inspection upload process.
Press the [Stop] button to stop the automatic inspection upload process.

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5.4 Inspection Batch File Summary – TMA5510

Figure 57 - Inspection Batch File Summary

5.4.1 General Information

This is a query only screen. Through this screen it is possible to view inspection batches that have been loaded either manually or using the automatic process.

It is used to check on the status of all files Uploaded/Downloaded and to view errors or warnings that may have occurred.

5.4.2 Sorting Results

Results within the form may be sorted by any of the displayed fields by pressing the field name (column heading) which are also 'Sort' buttons. The first time a heading is pressed the records are sorted in ascending order. If pressed again the records within the column will be sorted in descending order. A 'carat' (^) symbol or lower case 'v' is displayed adjacent to the column name to indicate that the data has been sorted in ascending or descending order respectively as shown below.

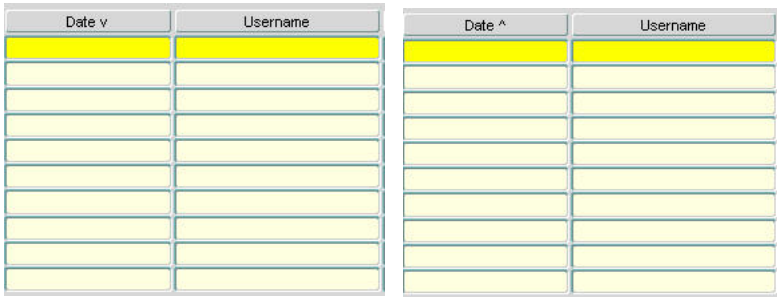

Figure 58 - Sort

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5.4.3 Inspection Batch Files

The Inspection Batch Files form lists each inspection batch file record.

File Id ***Display Only***

The Id of the batch file will be displayed.

Filename ***Display Only***

The filename of the batch file will be displayed.

Date ***Display Only***

The date and time of the batch file will be displayed.

Username ***Display Only***

The username of the user initiating the batch file load will be displayed.

Read/Write Error ***Display Only/Checkbox***

This box will be checked if there were any warnings in the batch file load.

TRX Error(s) ***Display Only/Checkbox***

This box will be checked if there were any transaction errors in the batch file load.

Further details of the transaction can be viewed by using the [**Transactions**] option under the [**Links**] menu on the toolbar.

Documents

Exist ***Display Only***

This box will be checked if there were documents to be loaded in the batch file.

Error(s) ***Display Only***

This box will be checked if there were errors loading the documents.

Further details of the document load errors can be viewed by using the [**Document Bundles**] option under the [**Links**] menu on the toolbar.

Message ***Display Only***

This box will show information concerning any errors in the batch file load.

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5.4.4 Links

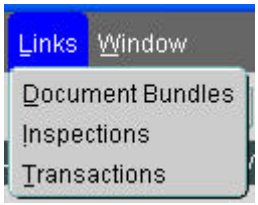

Figure 59 - Links

To view details of the documents associated with an inspection batch file, highlight the filename and select the 'Document Bundles' option on the 'Links' menu.

This will call the *Document Bundles – DOC0310* module.

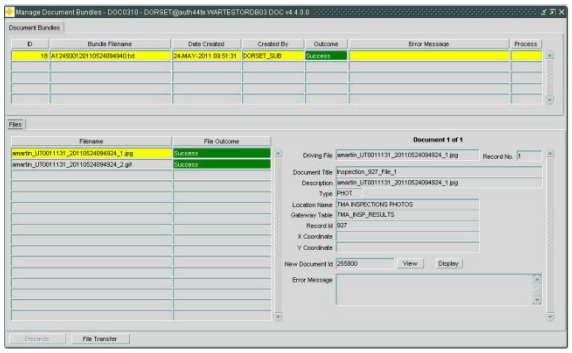

Figure 60 – Document Bundles

Details of all the documents associated with the selected file will be shown.

To view details of the inspection associated with an inspection batch file, highlight the filename and select the 'Inspections' option on the 'Links' menu.

This will call the *Inspections – TMA5000* module.

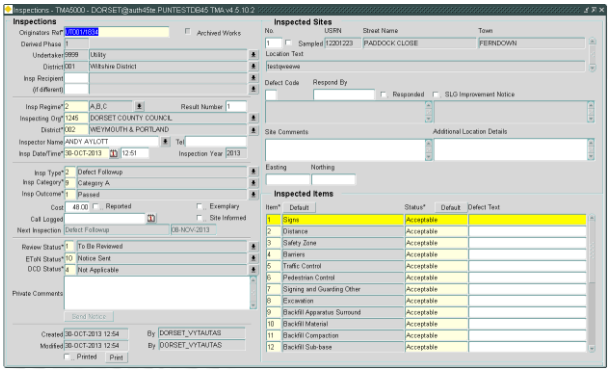

Figure 61 - Inspections

Details of all the inspections associated with the selected file will be shown.

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To view details of the transactions associated with an inspection batch file, highlight the filename and select the 'Transactions' option on the 'Links' menu.

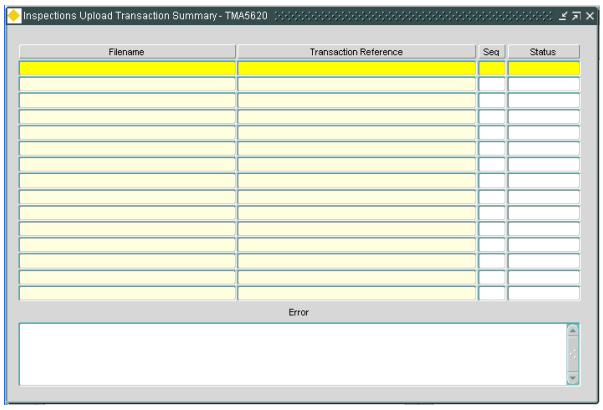

Figure 62 - Transactions

This will call the *Inspections Upload Transaction Summary – TMA5620* module.

Details of the transactions associated with the selected file will be shown.

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5.5 Inspection Upload Transaction Summary – TMA5620

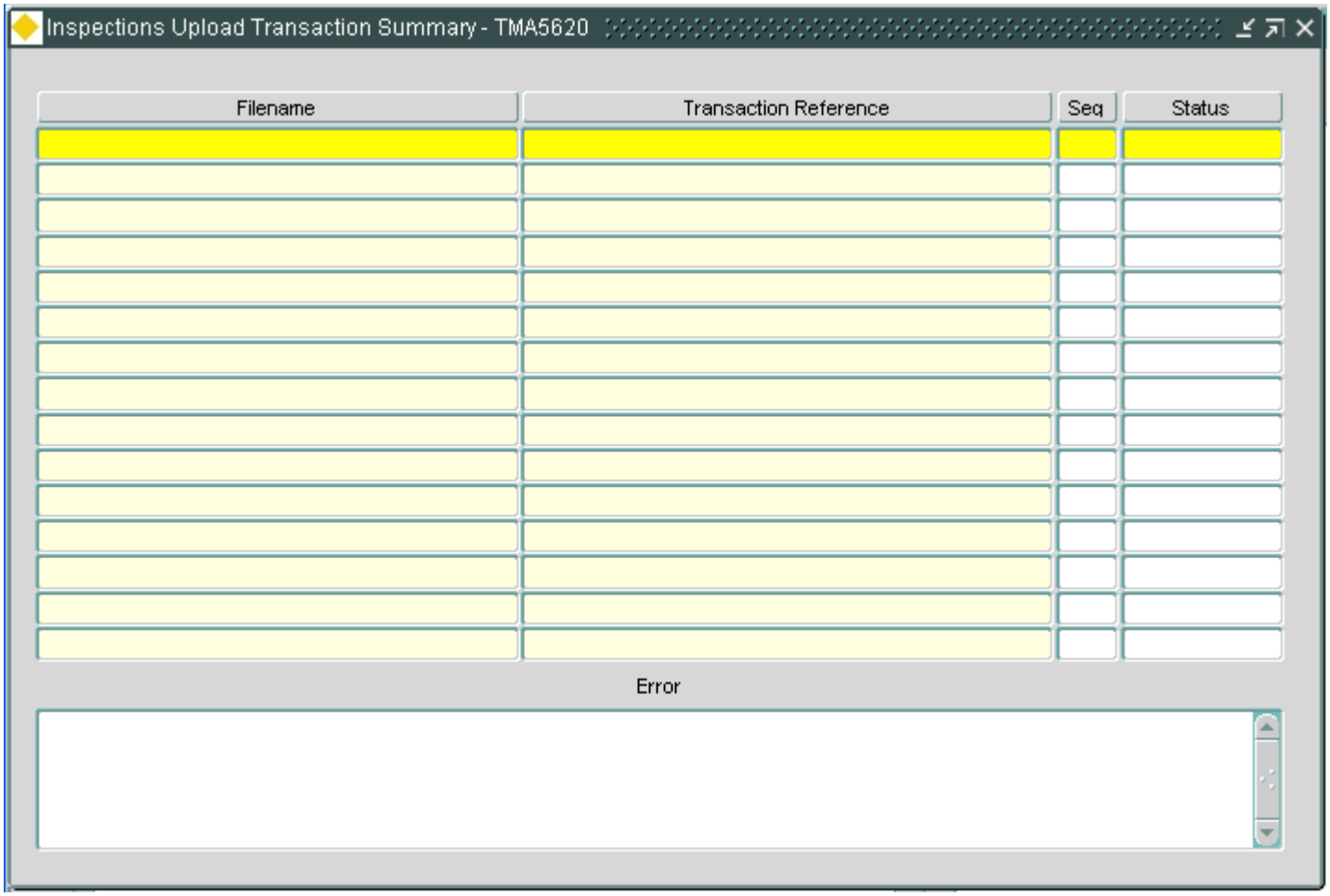

Figure 63 - Inspection Upload Transaction Summary

5.5.1 General Information

This is a query only screen. Through this screen it is possible to view inspection batches either uploaded manually or uploaded using the batch interface.

Each Inspection Batch will have its own transaction Reference, Sequence and Status of the load.

Any Batch with an error that is selected in the top half of the form will have the relevant reason displayed in the Error box at the bottom.

5.5.2 Sorting Results

Results within the form may be sorted by any of the displayed fields by pressing the field name (column heading) which are also ‘Sort’ buttons. The first time a heading is pressed the records are sorted in ascending order. If pressed again the records within the column will be sorted in descending order. A ‘carat’ (^) symbol or lower case ‘v’ is displayed adjacent to the column name to indicate that the data has been sorted in ascending or descending order respectively as shown below.

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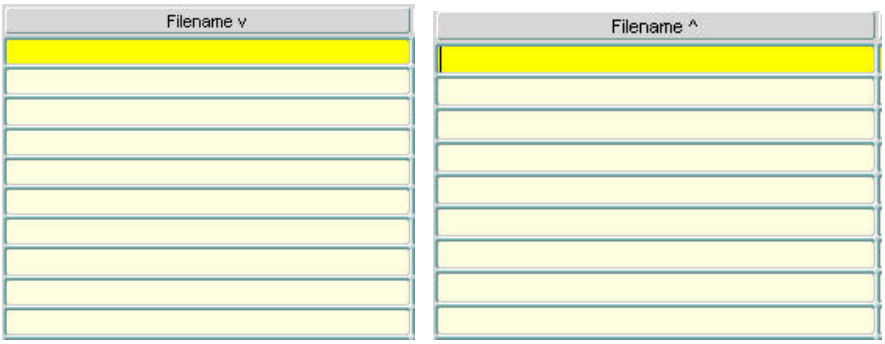

Figure 64 - Sort

5.5.3 Inspection Upload Transaction Summary

Filename ***Display Only***

The filename containing the inspection that has been uploaded will be displayed. There will be a separate entry for each inspection within the file.

Transaction Reference ***Display Only***

This field will display a transaction reference for the file.

Seq ***Display Only***

The sequence number of the inspection within the file will be displayed.

Status ***Display Only***

The status of either PASS or FAIL will be displayed.

Error ***Display Only***

If the status for the inspection is set to FAIL details of the error will be displayed.

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6 Batch Processing, DCD Inspections

Figure 65 – DCD Extract Menu

This chapter describes the forms and processes used for processing inspections for DCD use in *TMA by Exor*. They are the following forms:

- DCD Extract – TMA5515
- Inspection Download to DCD – TMA5520
- Automatic Inspection Download to DCD – TMA5530

The form descriptions provide you with detailed information about each TMA Works form in *TMA by Exor*, including:

- an overall description of the form
- a detailed explanation of each field, including available features (such as List of Values), default values and other characteristics
- helpful information for using the form

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6.1 DCD Extract – TMA5515

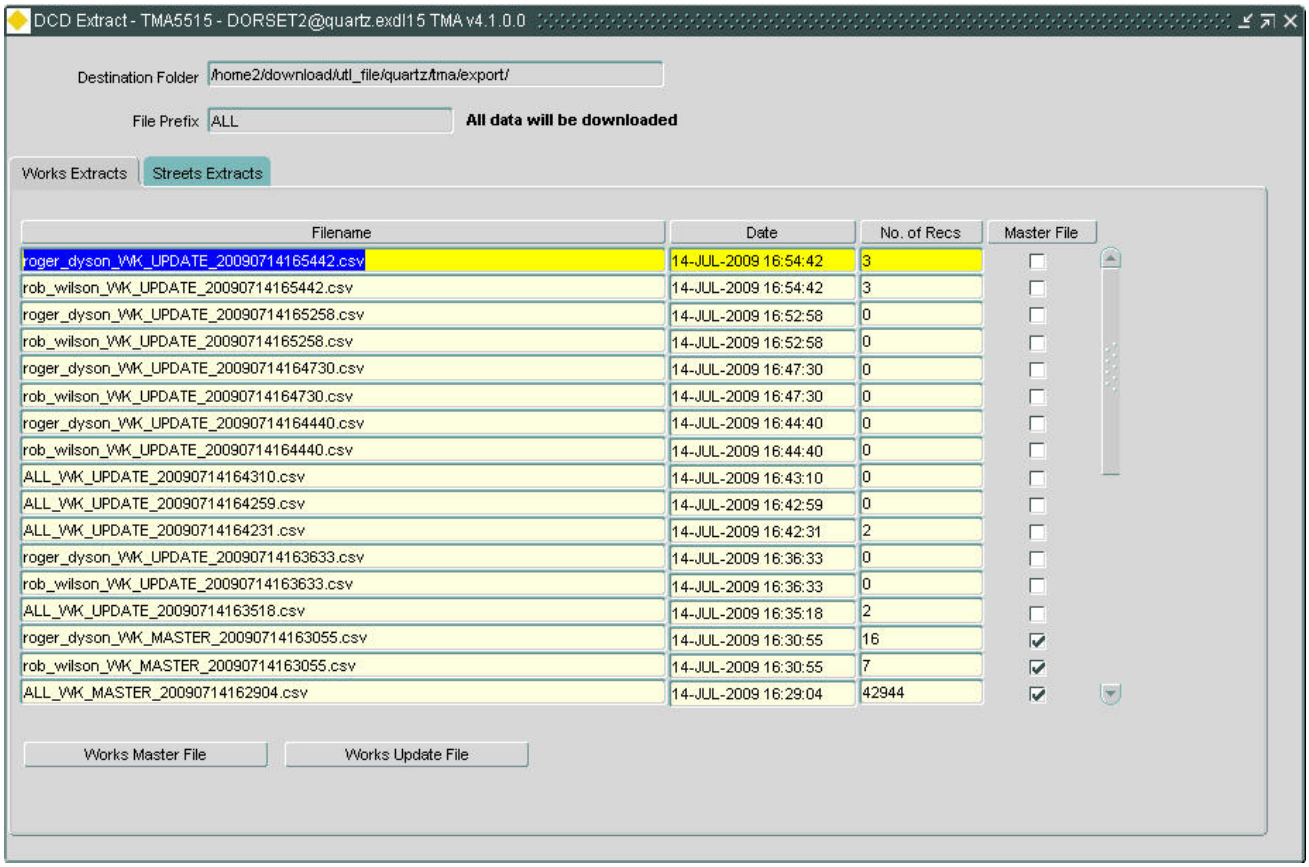

Figure 66 - DCD Extract

6.1.1 General Information

This *DCD Extract* form is used to download to the DCD (data capture device) either:

- all street or works data into a Master or Update file

or

- street or works data for inspectors into separate Master or Update files for those inspectors.

Product Option – DCDINSPCTR is used to control the files that are extracted.

If the option is set to Y the download will create an extract a file for each inspector.

If the option is set to N the download will create an extract file for all data.

Product Option – DCDFILPRFX can be set to define the prefix on a file when **Product Option - DCDINSPCTR** is set to N. The default value for this will be ALL.

The DCD is used for the electronic collection of works inspections out in the field.

All extract files will be written to the directory defined in form *Directories – HIG1895* under the option TMA_DCD_INSP_EXPORT_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - DCDINSPEXP**.

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6.1.2 Sorting Results

Results within the form may be sorted by any of the displayed fields by pressing the field name (column heading) which are also 'Sort' buttons. The first time a heading is pressed the records are sorted in ascending order. If pressed again the records within the column will be sorted in descending order. A 'carat' (^) symbol or lower case 'v' is displayed adjacent to the column name to indicate that the data has been sorted in ascending or descending order respectively as shown below.

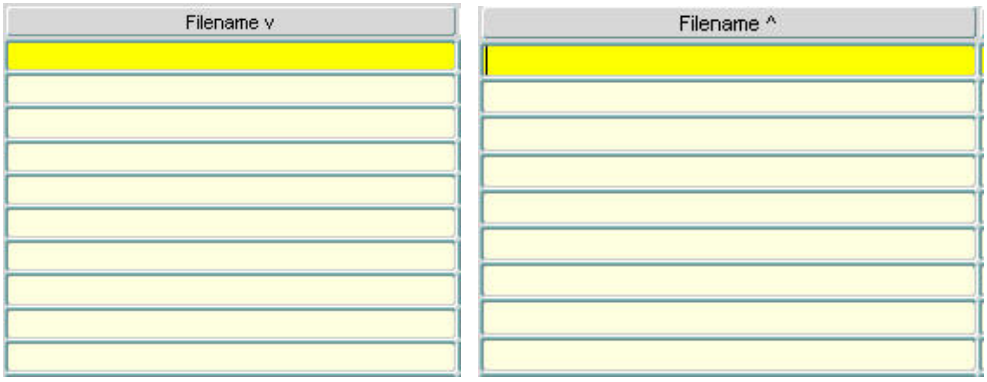

Figure 67 - Sort

6.1.3 File Destination

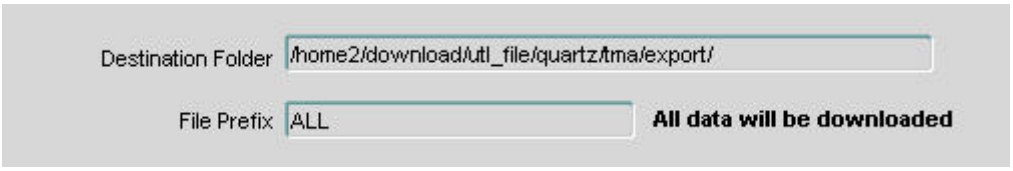

Figure 68 - File destination

This part of the form displays the destination of the extract file.

If **Product Option – DCDINSPCTR** is set to N:

Destination Folder ***Display Only***

The directory defined in form *Directories – HIG1895* under the option TMA_DCD_INSP_EXPORT_DIRECTORY will be displayed.

File Prefix ***Display Only***

The prefix defined in **Product Option – DCDFILPRFX** will be displayed.

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6.1.4 File Destination

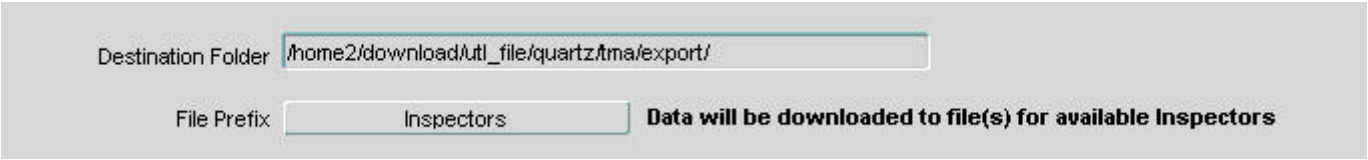

Figure 69 - File destination

If **Product Option – DCDINSPCTR** is set to Y:

Destination Folder ***Display Only***

The directory defined in form *Directories – HIG1895* under the option TMA_DCD_INSP_EXPORT_DIRECTORY will be displayed.

Inspectors ***Display Only***

The prefix for files will be based on the available Inspectors Name.

The [**Inspectors**] button can be used to call the *Inspectors – TMA5290* module to view available inspectors.

Note: Works and street data created in both the Master and Update files for an Inspector is based on the street groups defined against that Inspector.

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6.1.5 Works Extract

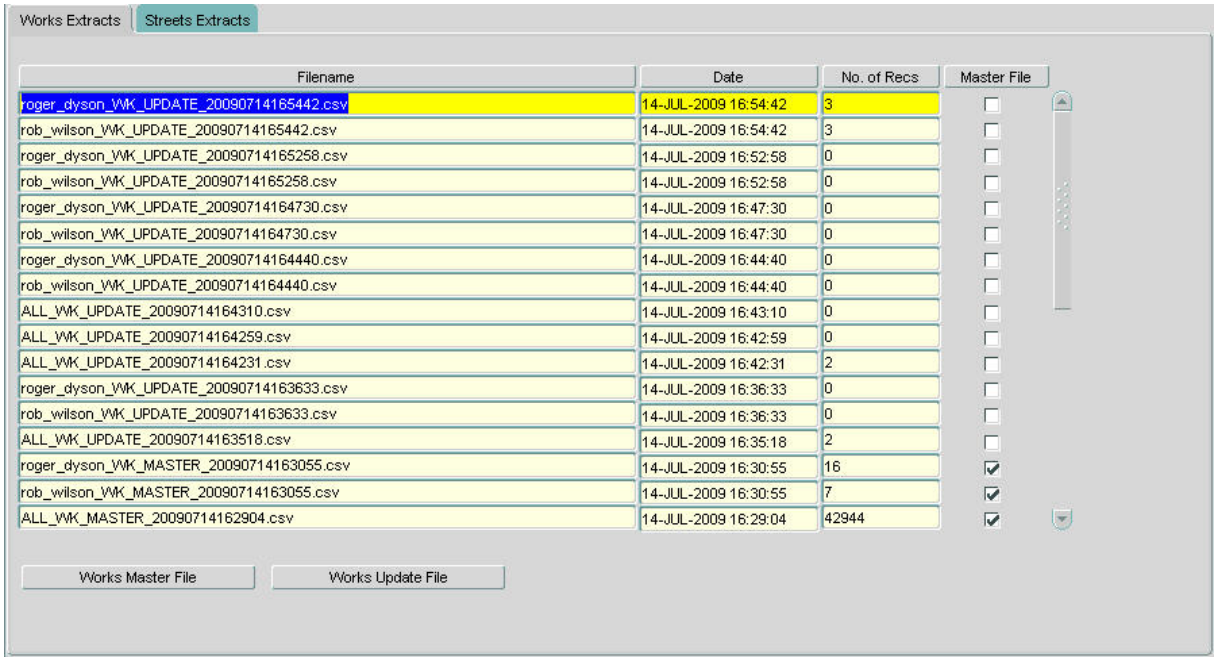

Figure 70 - Works Extract

The [**Works Extract**] tab shows details of previous extracts that have been created and allows new extracts to be created.

Work files will contain archived works and TMA works.

If the Master flag is ticked this is a complete list of all works. If not ticked the list will only contain updates for the existing files on the DCD.

Filename ***Display Only***

The filename created will be displayed.

Date ***Display Only***

The date the file was created will be displayed.

No. of Recs ***Display Only***

The number of records in the extract file will be displayed.

Master File ***Checkbox***

The checkbox will be ticked if the created file is a master file.

The [**Works Master File**] button will create a new masterwork file based on the parameters specified.

For example, this would be used for the initial set up a new DCD.

The [**Works Update File**] button will create a work file of updates only of the main master file.

As the master file could potentially be very large and take some time both to create and to load into the DCD, the update file is used to update the DCD of changes only of the master file.

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6.1.6 Street Extracts

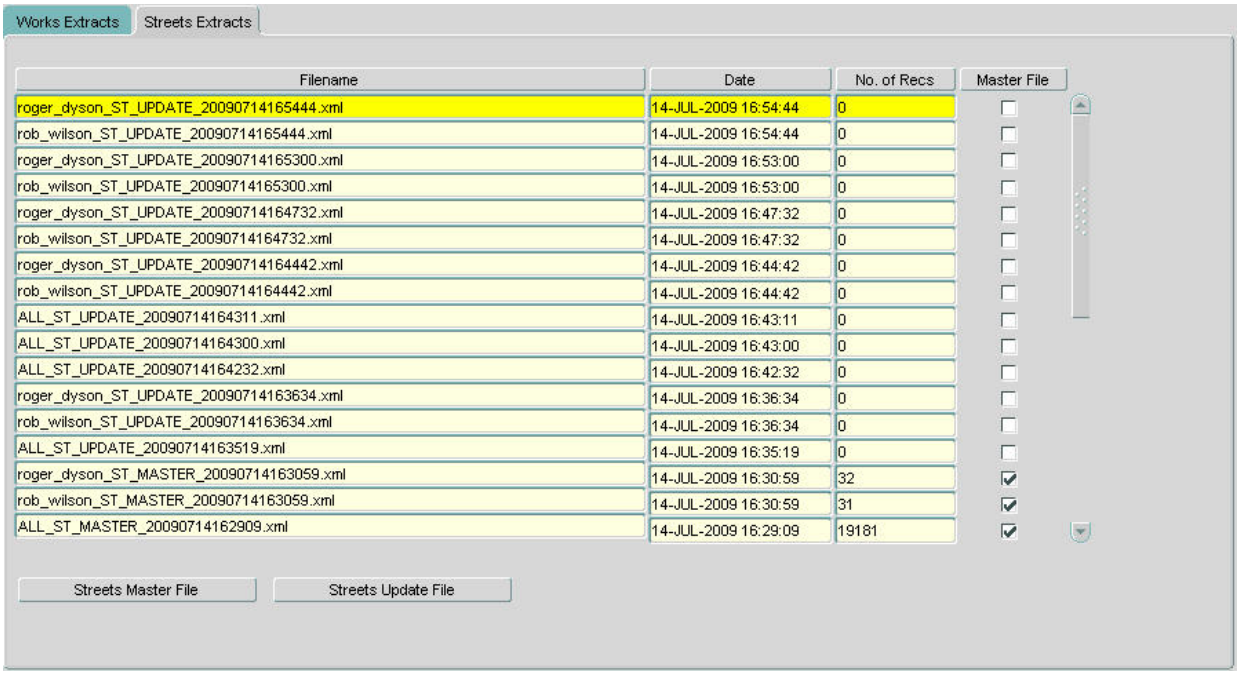

Figure 71 - Street Extract

The [**Streets Extracts**] tab will show details of previous extracts that have been created.

If the Master flag is ticked this is a complete list of all streets. If not ticked the list will only contain updates for the existing files on the DCD.

Filename ***Display Only***

The filename created will be displayed.

Date ***Display Only***

The date the file was created will be displayed.

No. of Recs ***Display Only***

The number of records in the extract file will be displayed.

Master File ***Checkbox***

The checkbox will be ticked if the created file is a master file.

The [**Streets Master File**] button will create a new master street file based on the parameters specified.

For example, this would be used for the initial set up a new DCD.

The [**Streets Update File**] button will create a street file of updates only of the main master file.

As the master file could potentially be very large and take some time both to create and to load into the DCD, the update file is used to update the DCD of changes only of the master file.

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6.2 Inspections Download to DCD – TMA5520

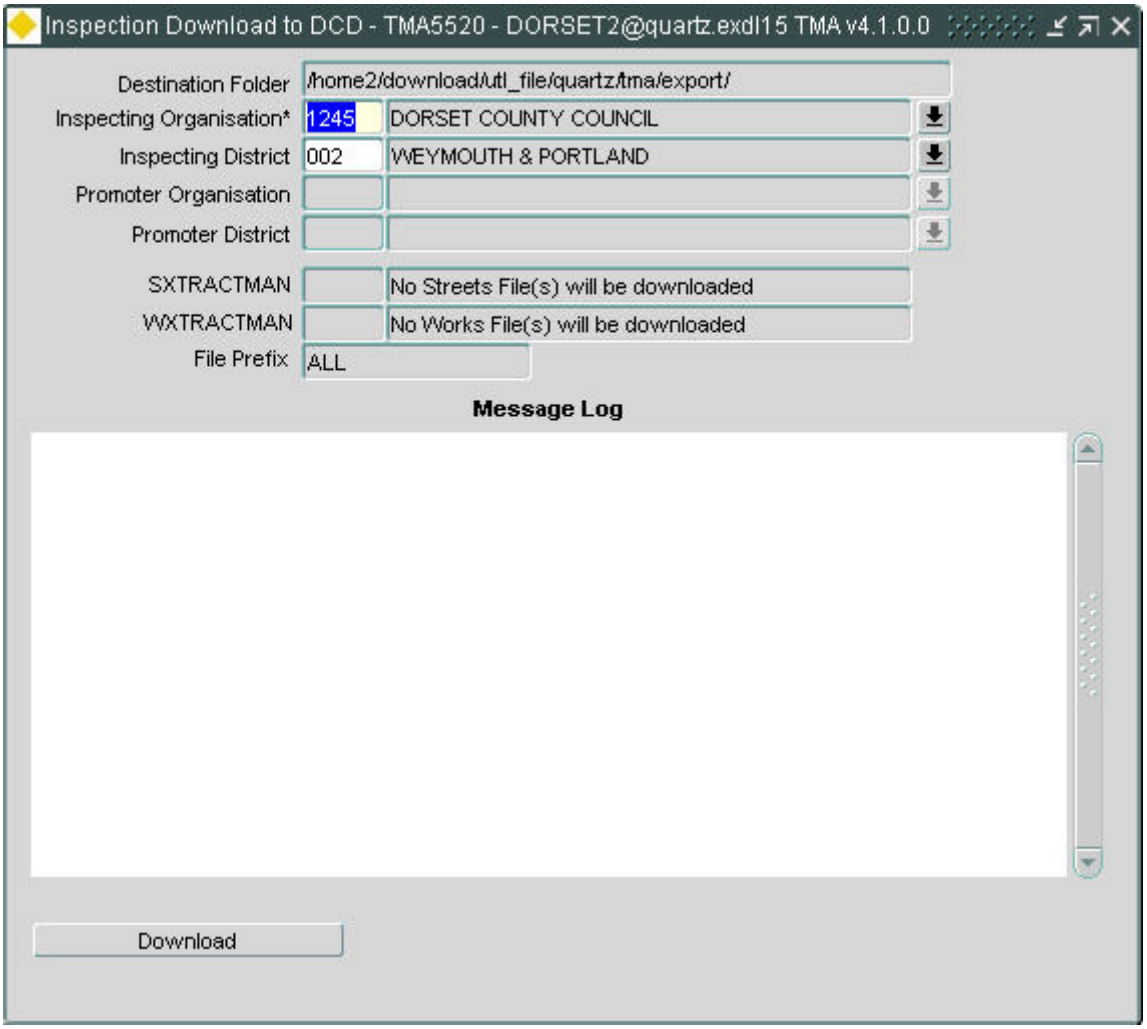

Figure 72 - Inspection Download To DCD

6.2.1 General Information

This form is used to manually download (export data to a file) inspections ready to be used on the DCD. The destination folder will have been defined in form *Directories – HIG1895* under the option 'TMA_DCD_INSP_EXPORT_DIRECTORY'.

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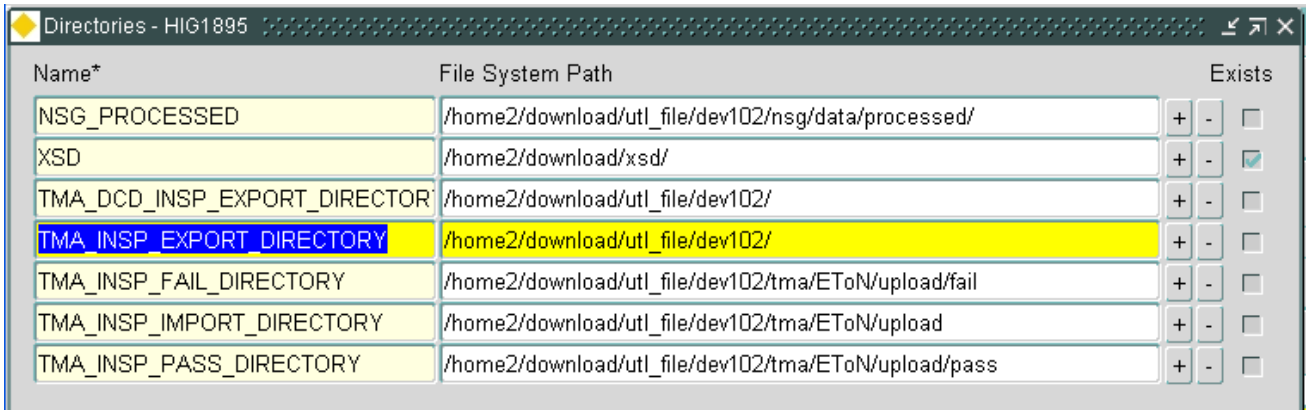

Figure 73 - Directories

The fields shown on the form are dependent on the value entered into **Product Option – DCDINSPCTR**.

The user can then select the organisation and district to export to the DCD.

The process can be done automatically using form *Automatic Inspection Download to DCD – TMA5530.*

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6.2.2 Inspection Download – All

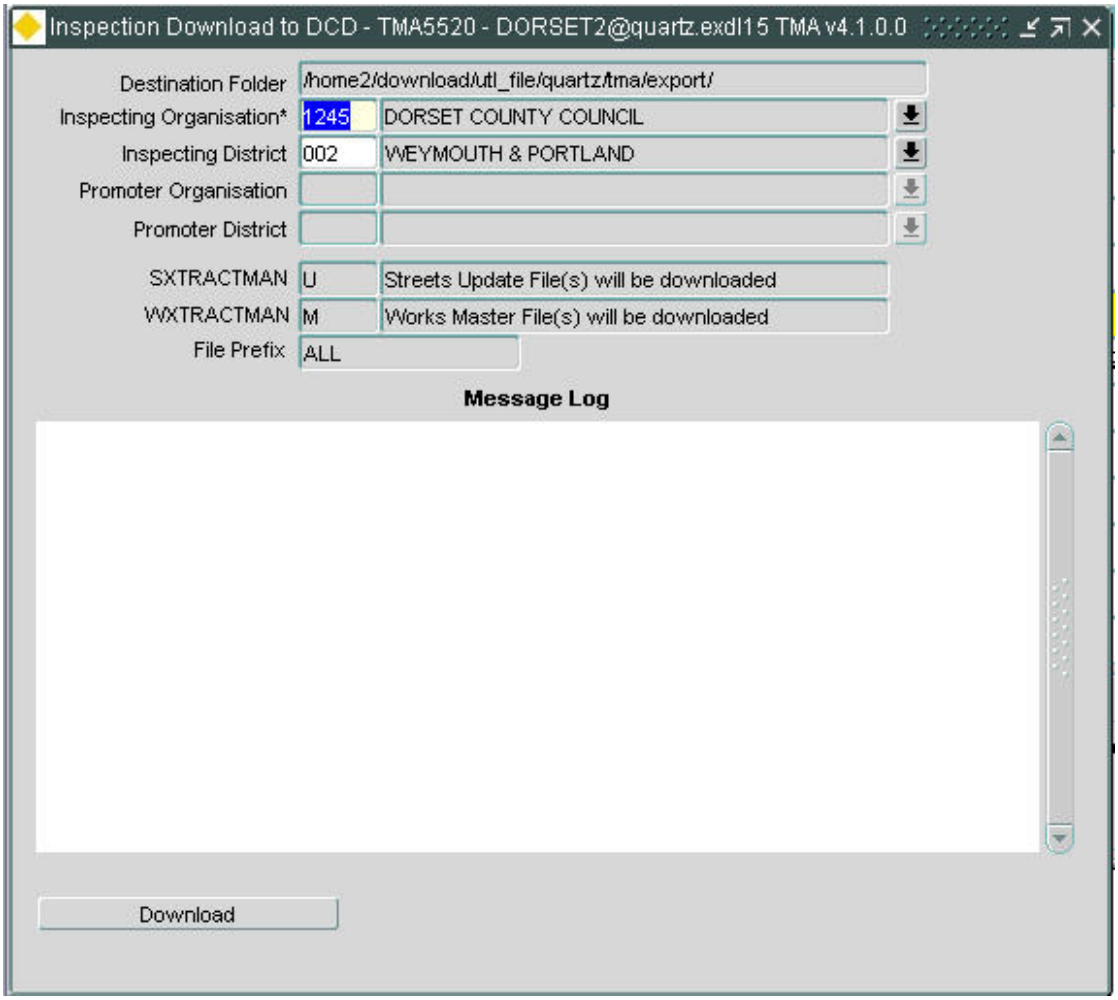

Figure 74 - Inspection Download To DCD

If **Product Option – DCDINSPCTR** is set to N:

Destination Folder ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_DCD_INSP_EXPORT_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - DCDINSPEXP**.

Inspecting Organisation ***Mandatory*** ***List***

Enter the organisation carrying out the inspections.

Inspecting District ***Mandatory*** ***List***

Enter the organisational district of the organisation carrying out the inspections.

Promoter Organisation ***Display Only***

This field is not available for entry.

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Promoter District ***Display Only***

This field is not available for entry.

SEXTRACTMAN ***Display Only***

The value entered into Product Option – SXTRACTMAN will be displayed. Values could be either *M – Master* or *U – Update*.

WEXTRACTMAN ***Display Only***

The value entered into **Product Option – WXTRACTMAN** will be displayed. Values could be either *M – Master* or *U – Update*.

File Prefix ***Display Only***

The prefix defined in **Product Option – DCDFILPRFX** will be displayed.

Message Log ***Display Only***

This field will detail the download process and list the files produced as a result of the download operation.

The [**Download**] button will start the manual inspection download. Inspections with a DCD status of 'Ready for Download' and an inspection outcome of 'Unknown' will be downloaded.

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6.2.3 Inspection Download – Inspectors

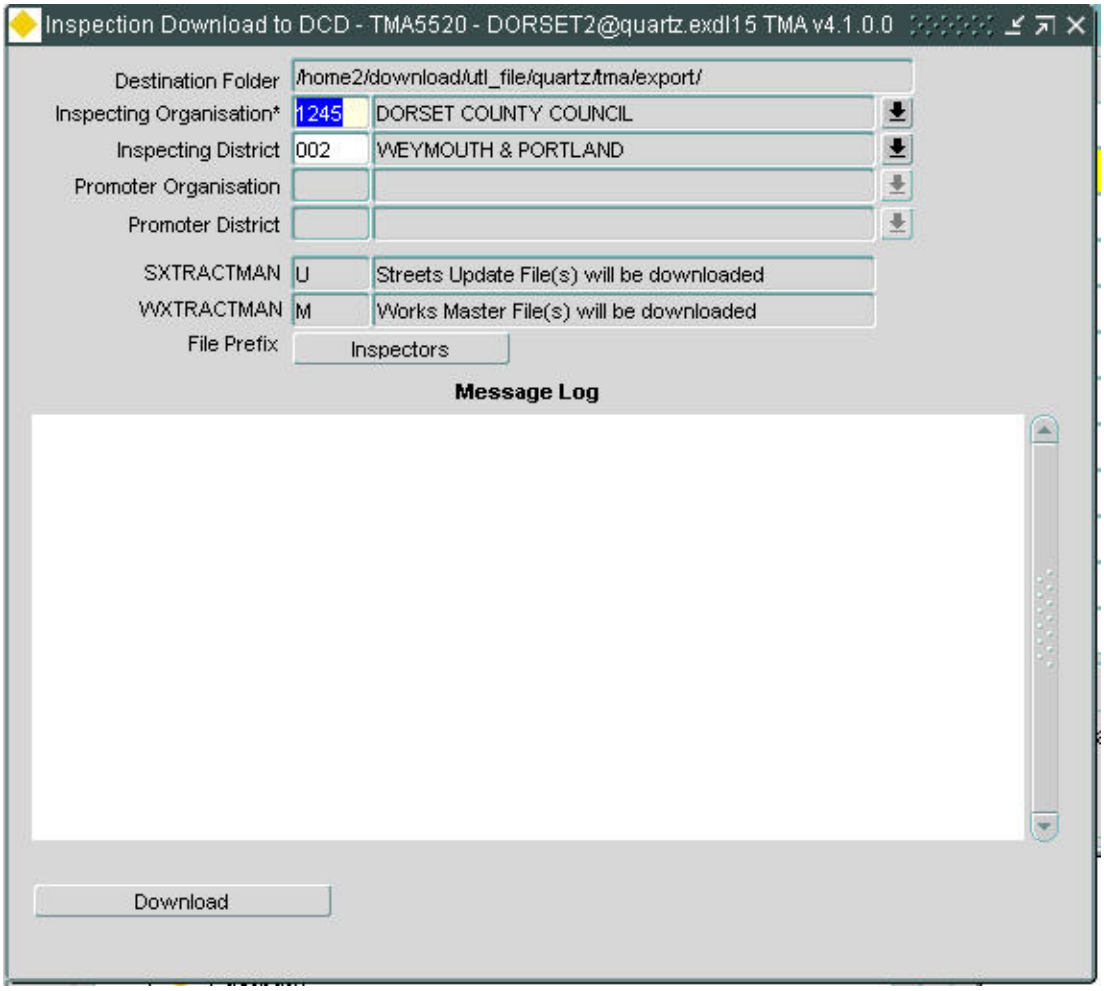

Figure 75 - Inspection Download To DCD

If **Product Option – DCDINSPCTR** is set to Y:

Destination Folder ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_DCD_INSP_EXPORT_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - DCDINSPEXP**.

Inspecting Organisation ***Mandatory*** ***List***

Enter the organisation carrying out the inspections.

Inspecting District ***Mandatory*** ***List***

Enter the organisational district of the organisation carrying out the inspections.

Promoter Organisation ***Display Only***

This field is not available for entry.

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Promoter District ***Display Only***

This field is not available for entry.

SEXTRACTMAN ***Display Only***

The value entered into **Product Option – SXTRACTMAN** will be displayed. Values could be either *M – Master* or *U – Update*.

WEXTRACTMAN ***Display Only***

The value entered into **Product Option – WXTRACTMAN** will be displayed. Values could be either *M – Master* or *U – Update*.

File Prefix ***Display Only***

The prefix for files will be based on the available Inspectors Name.

The [**Inspectors**] button can be used to call the *Inspectors – TMA5290* module to view available inspectors.

Message Log ***Display Only***

This field will detail the download process and list the files produced as a result of the download operation.

The [**Download**] button will start the manual inspection download. Inspections with a DCD status of 'Ready for Download' and an inspection outcome of 'Unknown' will be downloaded.

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6.3 Automatic Inspection Download to DCD – TMA5530

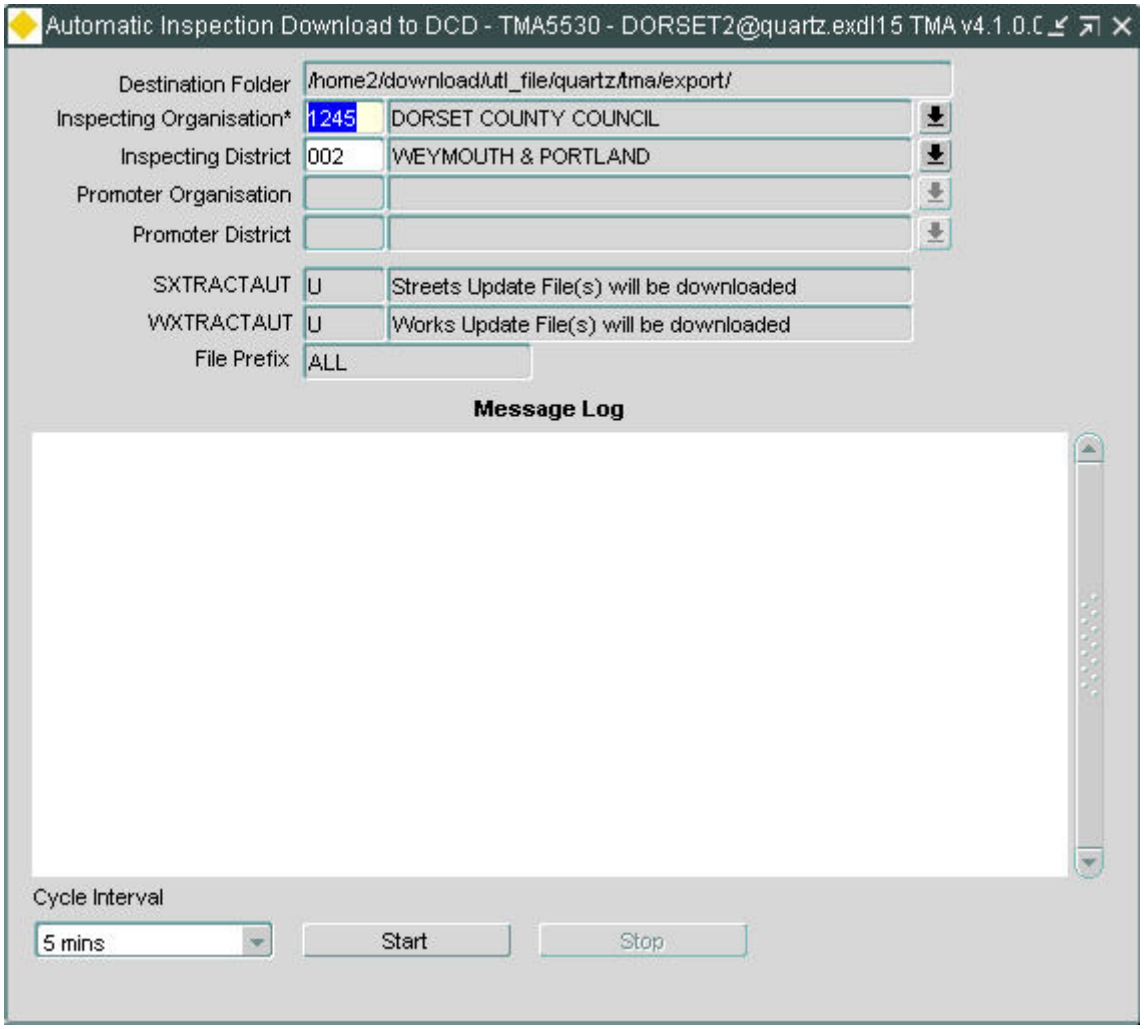

Figure 76 - Auto Inspection Download to DCD

6.3.1 General Information

This form is used to automatically download (export data to a file) Inspections ready to be used on the DCD. The destination folder will have been defined in form *Directories – HIG1895* under the option 'TMA_DCD_INSP_EXPORT_DIRECTORY'.

This is an automatic process which can also be done manually using form *Inspection Download to DCD – TMA5520*.

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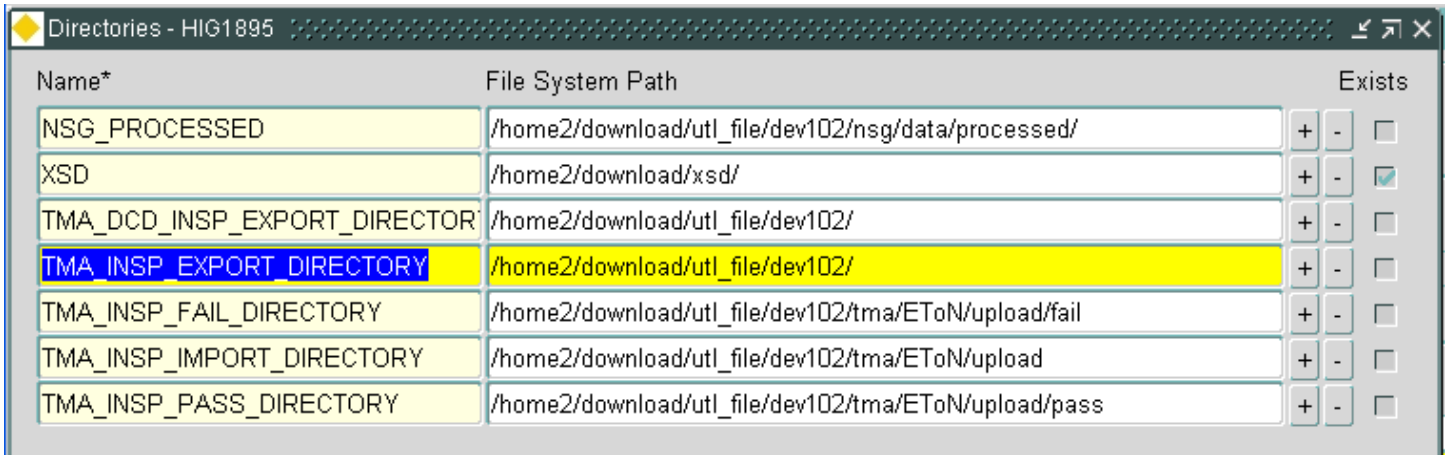

Figure 77 - Directories

The user can then select the organisation and district to export to the DCD.

The frequency by which this process is run is controlled by the cycle drop down at the bottom of the form.

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6.3.2 Automatic Inspection Download – All

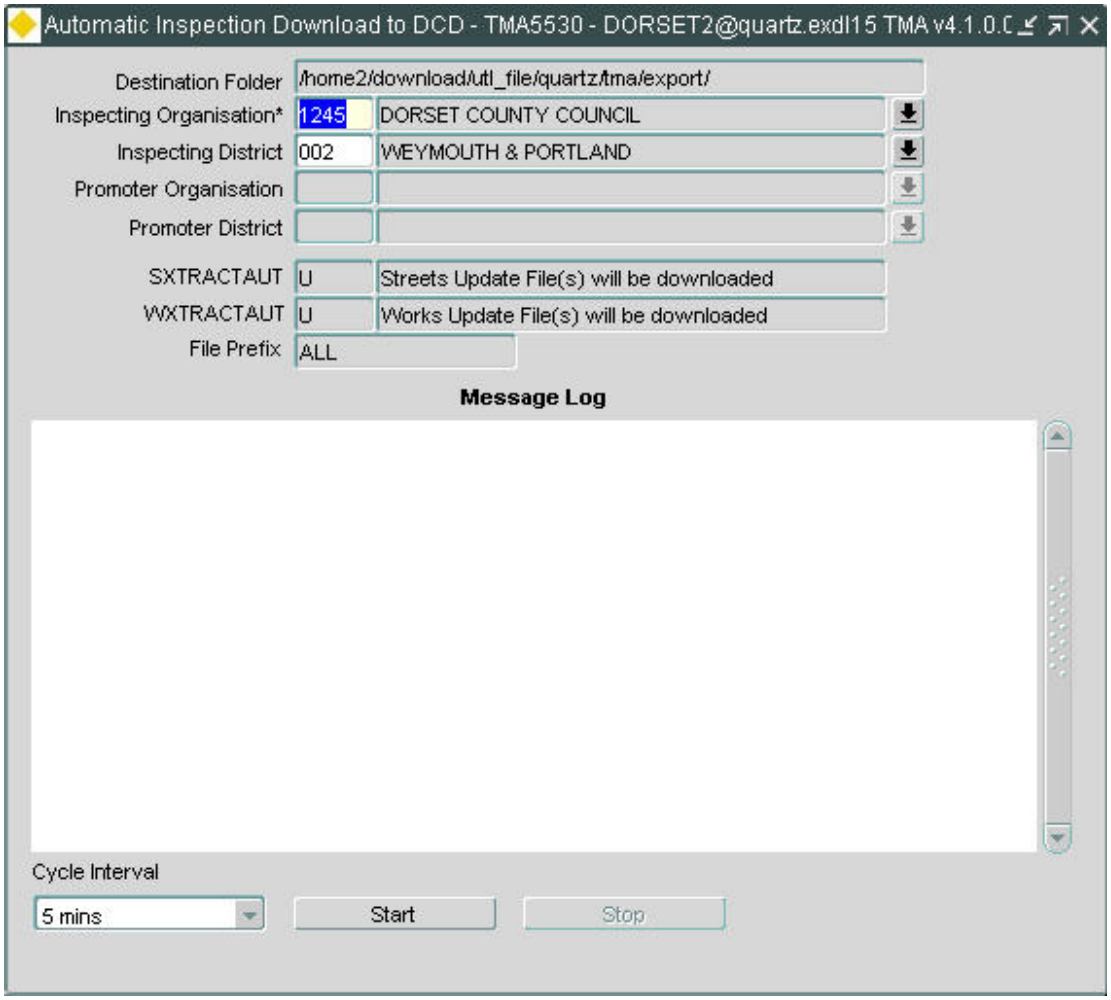

Figure 78 - Auto Inspection Download to DCD

If **Product Option – DCDINSPCTR** is set to N:

Destination Folder ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_DCD_INSP_EXPORT_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - DCDINSPEXP**.

Inspecting Organisation ***Mandatory*** ***List***

Enter the organisation carrying out the inspections.

Inspecting District ***Mandatory*** ***List***

Enter the organisational district of the organisation carrying out the inspections.

Promoter Organisation ***Display Only***

This field is not available for entry.

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Promoter District ***Display Only***

This field is not available for entry.

SEXTRACTAUT ***Display Only***

The value entered into **Product Option – SXTRACTAUT** will be displayed. Values could be either *M – Master* or *U – Update*.

WEXTRACTAUT ***Display Only***

The value entered into **Product Option – WXTRACTAUT** will be displayed. Values could be either *M – Master* or *U – Update*.

File Prefix ***Display Only***

The prefix defined in **Product Option – DCDFILPRFX** will be displayed.

Message Log ***Display Only***

This field will detail the download process and list the files produced as a result of the download operation.

The [**Download**] button will start the automatic inspection download. Inspections with a DCD status of 'Ready for Download' and an inspection outcome of 'Unknown' will be downloaded.

The date and time of the next upload cycle will also be shown.

Cycle Interval ***Optional*** ***List***

Enter the interval that the system will use to download available inspections.

Press the [**Start**] button to start the automatic inspection download to DCD process.

Press the [**Stop**] button to stop the automatic inspection download to DCD process.

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6.3.3 Automatic Inspection Download – Inspectors

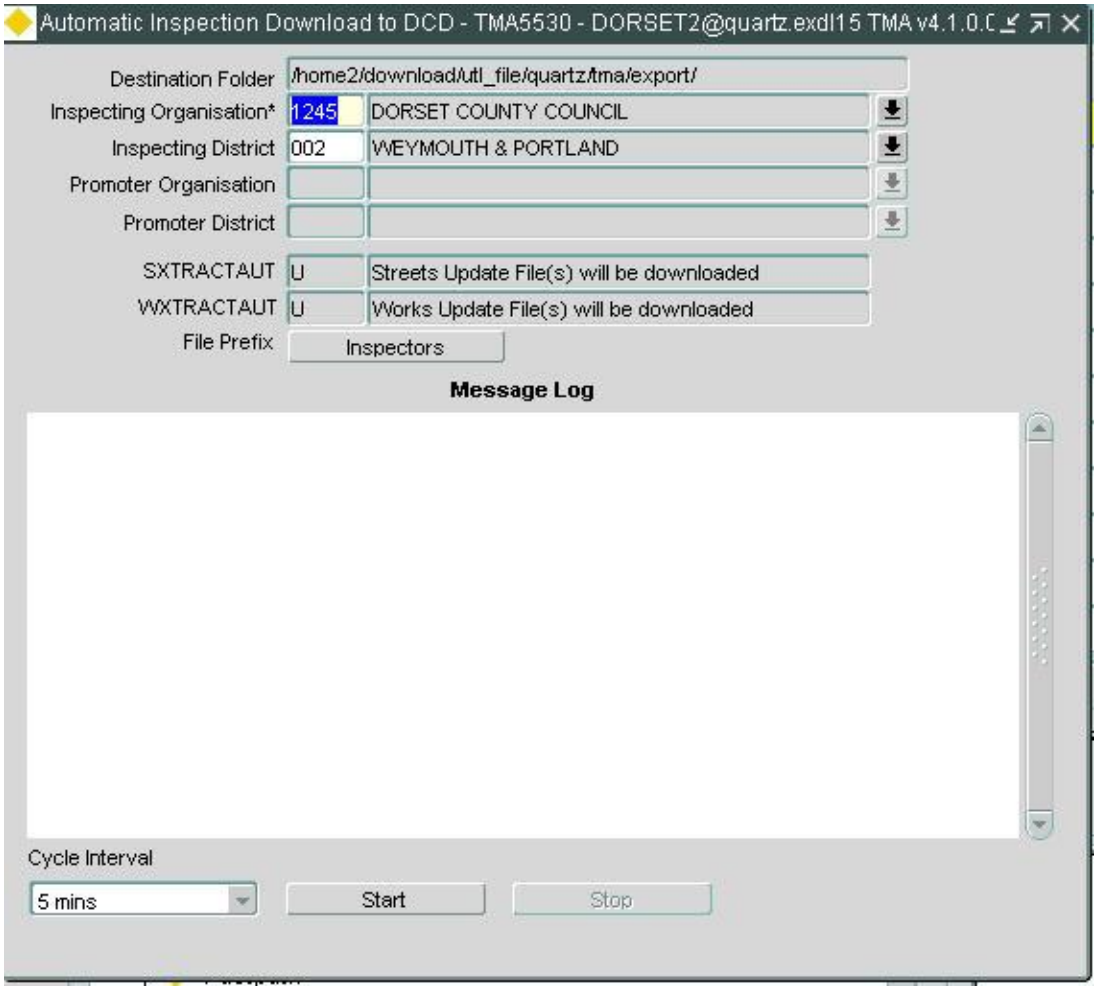

Figure 79 - Auto Inspection Download to DCD

If **Product Option – DCDINSPCTR** is set to Y:

Destination Folder ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_DCD_INSP_EXPORT_DIRECTORY.

Note: The name of the directory must correspond with the value in **Product Option/User Option - DCDINSPEXP**.

Inspecting Organisation ***Mandatory*** ***List***

Enter the organisation carrying out the inspections.

Inspecting District ***Mandatory*** ***List***

Enter the organisational district of the organisation carrying out the inspections.

Promoter Organisation ***Display Only***

This field is not available for entry.

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Promoter District ***Display Only***

This field is not available for entry.

SEXTRACTAUT ***Display Only***

The value entered into **Product Option – SXTRACTAUT** will be displayed. Values could be either *M – Master* or *U – Update*.

WEXTRACTAUT ***Display Only***

The value entered into **Product Option – WXTRACTAUT** will be displayed. Values could be either *M – Master* or *U – Update*.

File Prefix ***Display Only***

The prefix for files will be based on the available Inspectors Name.

The [**Inspectors**] button can be used to call the *Inspectors – TMA5290* module to view available inspectors.

Message Log ***Display Only***

This field will detail the download process and list the files produced as a result of the download operation.

The [**Download**] button will start the automatic inspection download. Inspections with a DCD status of 'Ready for Download' and an inspection outcome of 'Unknown' will be downloaded.

The date and time of the next upload cycle will also be shown.

Cycle Interval ***Optional*** ***List***

Enter the interval that the system will use to download available inspections.

Press the [**Start**] button to start the automatic inspection download to DCD process.

Press the [**Stop**] button to stop the automatic inspection download to DCD process.

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7 Batch Processing, TPI – TMA Performance Indicators

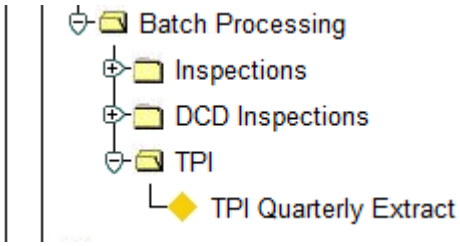

Figure 80 – TPI Quarterly Extract Menu

This chapter describes the forms and processes used for processing the TPI Quarterly Extract in *TMA by Exor*. They are the following forms:

TMA Performance Indicator Quarterly Extract – TMA5540

The form descriptions provide you with detailed information about each TMA Works form in *TMA by Exor*, including:

- an overall description of the form
- a detailed explanation of each field, including available features (such as List of Values), default values and other characteristics
- helpful information for using the form

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7.1 TPI Quarterly Extract – TMA5540

7.1.1 General Information

The process named Tma_Works_Phase_Master_Refresh is a database job that is responsible for keeping the data for TPI up to date. By default this database job should run once a day at midnight. This can be changed to suit the needs of each installation but frequent running of this during the day or during peak load times may cause the system to run slower.

Note: Before TPI can be used this job must be run once after the installation is completed.

By default if the process is left to run on its own, TPI will be available on the system the next day.

If TPI is required immediately after installation then the database job should be run once using the [Run Now] button on the Process Monitor – HIG2520. Refer to the Chapter 2 for further information.

7.1.1.1 Authorities

Authorities running the TPI Extract would by default populate only the Authority, Year and Quarter fields, leaving the Promoter field blank, which indicates all Promoters are wanted. However should an Authority require (for their own purposes) to just extract a single Promoters TPI details then they can optionally provide a Promoter organisation in the relevant field.

However should the Authority choose to supply a Promoter organisation to the TPI process, the associated filename generated will not reflect it in its value and will remain in the standard format.

7.1.1.2 Promoters

Much like the way an Authority runs the TPI Extract, so would a Promoter. The difference being that they would by default populate only the Promoter, Year and Quarter fields, leaving the Authority field blank, which indicates all Authorities are wanted. However should a Promoter require (for their own purposes) to just extract a single Authority TPI details then they can optionally provide an Authority organisation in the relevant field.

Because the TPI extract is mainly an Authority tool the filename will only ever reflect a Promoters Organisation code if only a Promoter Organisation is provided. If an Authority Organisation code is supply at any point, the filename will reflect that code.

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7.1.2 TMA Performance Indicator Quarterly Extract

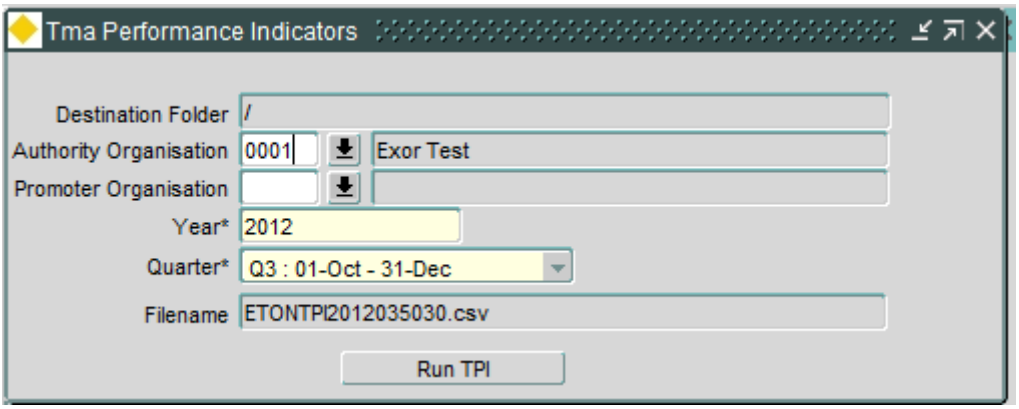

Figure 81 - TMA Performance Indicators Report

Destination Folder ***Display Only***

This field will be populated automatically using the directory defined in form *Directories – HIG1895* under the option TMA_TPI_DIRECTORY.

Note: On install of the TPI an Oracle directory is created to store the TPI result files onto the database server. By default this directory refers to '/' location on the database server. The directory will need to be changed to a location that suits organisational requirements. This must be somewhere the Oracle Database server can access.

Authority Organisation ***Optional*** ***List***

Enter the organisation for the report.

By default this will be populated if it is the default organisation associated with the person running the report.

Promoter Organisation ***Optional*** ***List***

Enter the promoter organisation for the report.

By default this will be populated if it is the default organisation associated with the person running the report.

Year ***Mandatory***

Enter the year for the report.

Quarter ***Mandatory*** ***List***

Enter the quarter for the report.

Filename ***Display Only***

Enter the quarter for the report.

The filename is generated and cannot be changed. It is made up of the following components:

ETONTPI – This is a static prefix as mentioned in the TPI specification.

YYYY – The TPI year the report was for as shown in the Year field.

QQ – The TPI quarter the report was run for as shown in the Quarter field.

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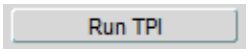
OOOO – The organisation code that the TPI report was run for as shown in the Authority Organisation or Promoter Organisation field.

ETONTPI2012030001.

[Run TPI] 

Press the [**Run TPI**] button to run the TPI extract and place onto the database server in the destination specified.

If the file already exists on the database server in the location specified then a message will appear.

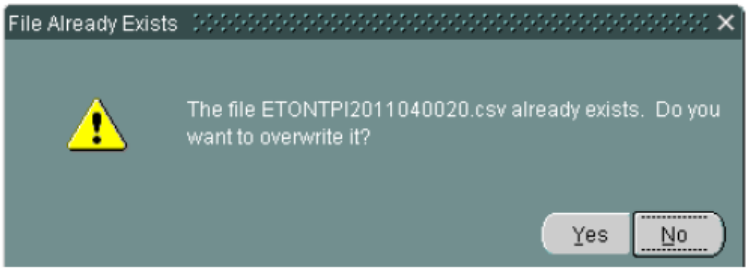


Figure 82 - Message

[**Yes**] will delete the existing file and generate a new one.

[**No**] will halt the process and return to the TPI input screen.

Once the process is complete the following screen will appear. This allows for the retrieval of the file from the database server onto a local directory.

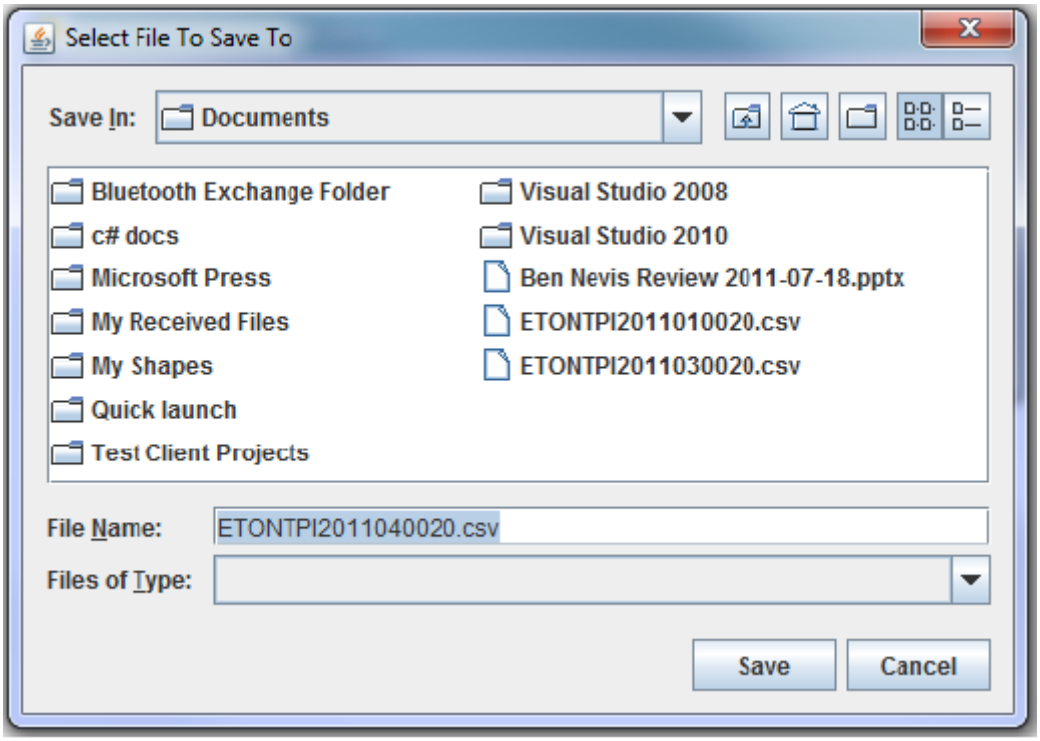


Figure 83 - Save to File

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8 Administration

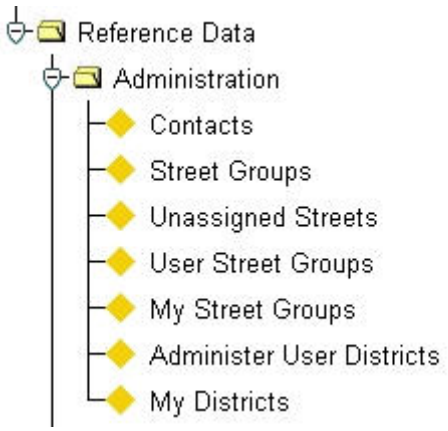

Figure 84 – Administration Menu

This chapter describes the forms and processes used for administration in *TMA by Exor*. They are the following forms:

- Contacts – TMA0010
- Street Groups – TMA0020
- Unassigned Streets – TMA0030
- User Street Groups – TMA0040
- My Street Groups – TMA0050
- Administer User Districts – NSG0120
- My Districts – NSG0130

The form descriptions provide you with detailed information about each TMA Works form in *TMA by Exor*, including:

- an overall description of the form
- a detailed explanation of each field, including available features (such as List of Values), default values and other characteristics
- helpful information for using the form

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8.1 Contacts – TMA0010

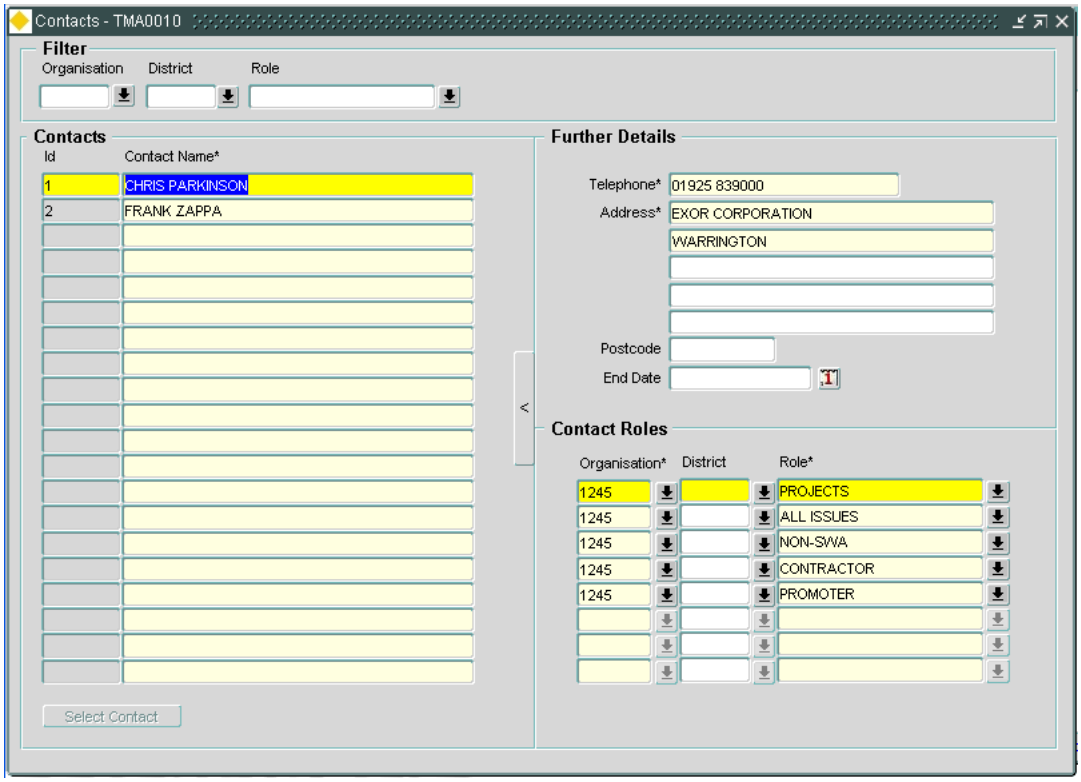

Figure 85 - Contacts

8.1.1 General Information

The Contacts form is used to keep a central list of all people that could be used in a Street works environment.

This form is used to associate contacts with selected organisations and to view a summary of the contact information. This form is automatically populated via the import of an operational district batch file (ODB) where contacts are present.

The contact is entered on the left of the page and further details can be entered and viewed on the right. If the right hand panel can't be seen click on the arrow in the middle right of the page to expand the tab.

Figure 86 – Contacts-Expand Information

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8.1.2 Filter

Figure 87 - Filter

Use the filter to view only those contacts for the specified criteria.

Organisation	***Optional***	***List***

Enter the organisation on which to filter the contact names.

District	***Optional***	***List***

Enter the organisational district on which to filter the contact names.

Role	***Optional***	***List***

Enter the role on which to filter the contact names.

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8.1.3 Contacts

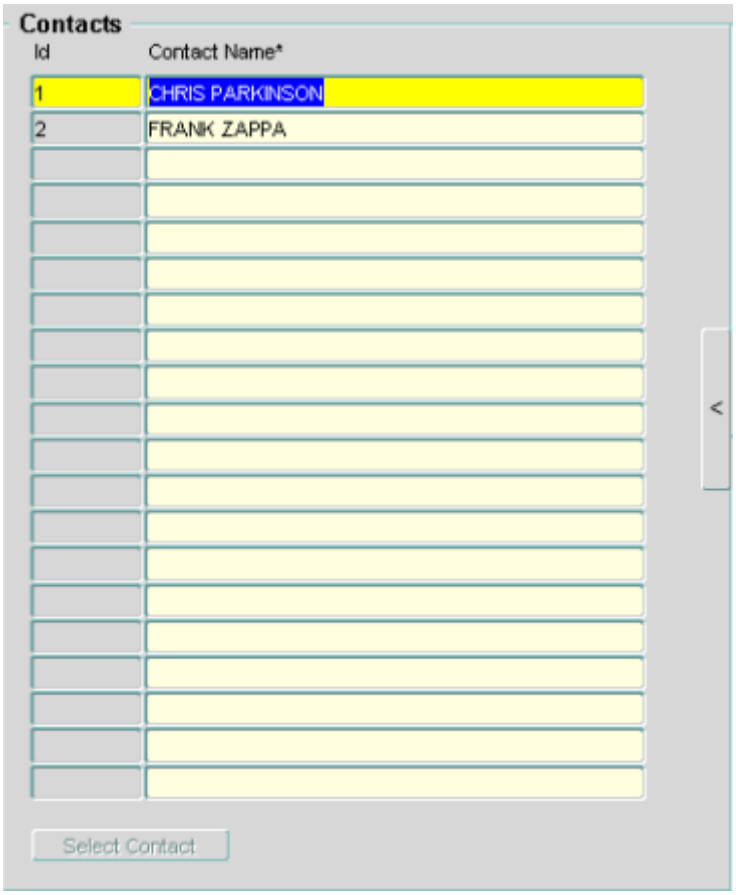

Figure 88 - Contacts

Id ***Mandatory***

A contact Id will be generated when the record is saved.

Contact Name ***Mandatory***

Enter the name of the contact.

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8.1.4 Further Details

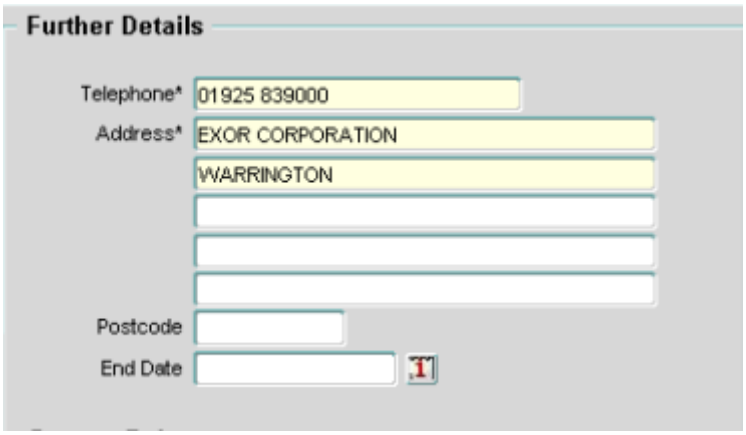

Figure 89 - Further Details

Telephone	***Mandatory***

Enter the telephone number of the contact.

Address	***Mandatory***

Enter the address of the contact

Postcode	***Optional***

Enter the postcode for the contact.

End Date	***Optional***

Enter the date the contact is no longer valid.

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8.1.5 Contact Roles

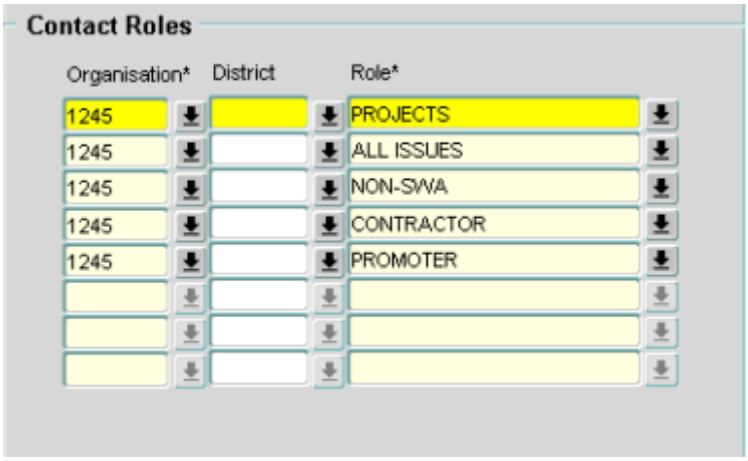

Figure 90 - Contact Roles

Organisation	***Mandatory***	***List***

Enter the organisation to which the contact is associated.

District	***Optional***	***List***

Enter the organisational district to which the contact is associated.

Role	***Mandatory***	***List***

Enter the role the contact has within the organisation and district entered in the previous fields.

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8.2 Street Groups – TMA0020

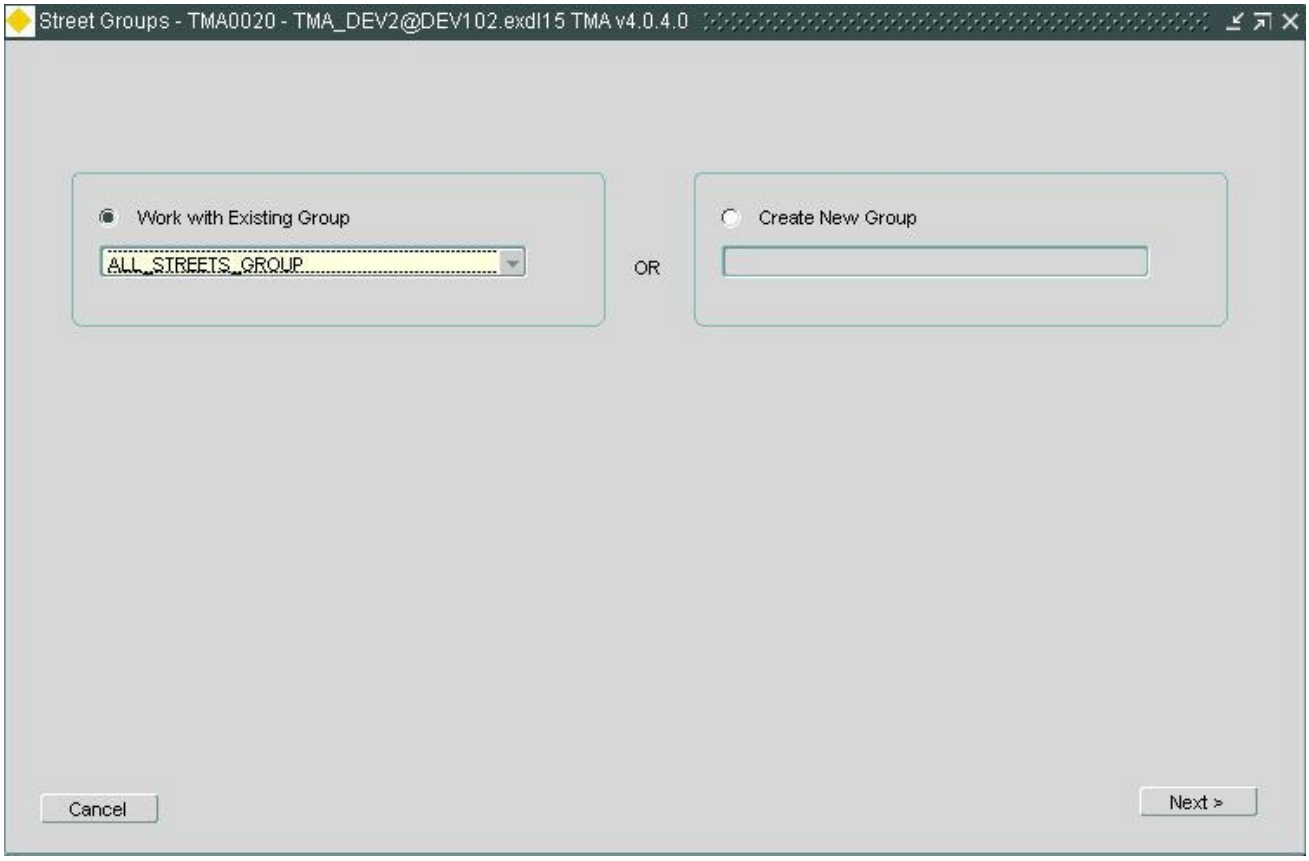

Figure 91 - Street Groups

8.2.1 General Information

The *Street Groups* form is used to view and amend existing street groups as well as create new street groups.

Streets are not exclusive to a street group and may exist in more than one street group. A street must belong to at least one street group.

Street groups are assigned to users to enable them to view and amend the data (including notices and inspections) associated with a street. If a street does not belong to a street group then the data associated with the street will not be available to view.

On implementation a street group of ALL_STREET_GROUPS may be created.

Street groups can also be created using *Locator* to select the area of interest.

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8.2.2 Work with Existing Groups

Figure 92 - Work with Existing Groups

Work with Existing Groups	***Optional***	***List***

Select this radio button to modify an existing street group.

To go on to the next step in amending an existing street group press the [Next] button. This will call the *Street Group Members* window.

8.2.2.1 Street Group Members

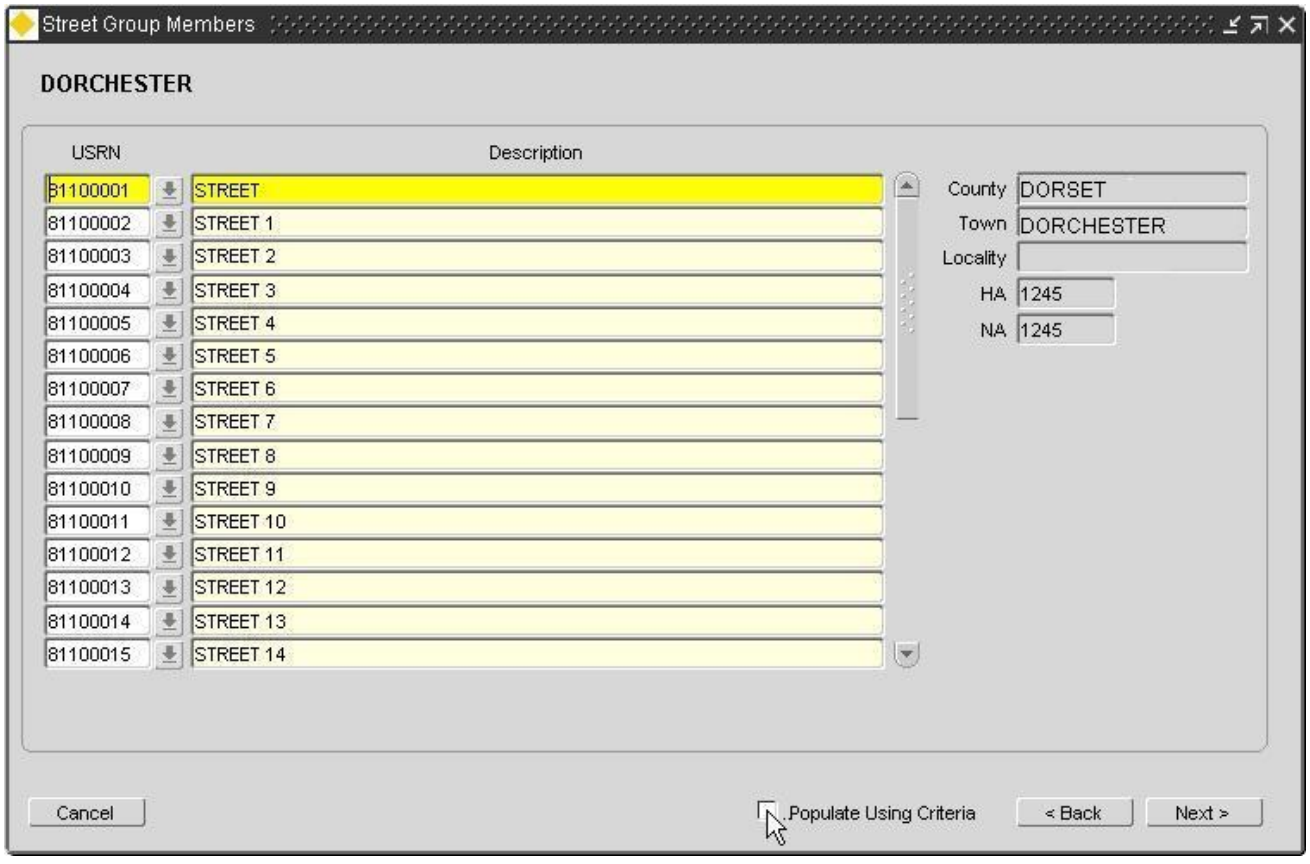

Figure 93 - Street Group Members

From this window it is possible to amend the street group by selecting criteria in the *Populate Groups From Criteria* window.

To amend the street group tick the *Populate Using Criteria* checkbox and press the [**Next**] button.

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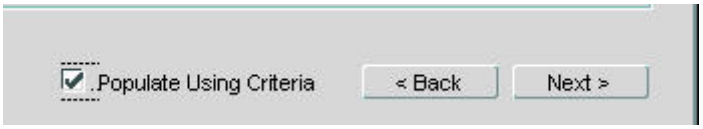

Figure 94 - Populate

This will call the *Populate Group Form Criteria* window.

8.2.2.2 Populate Group Form

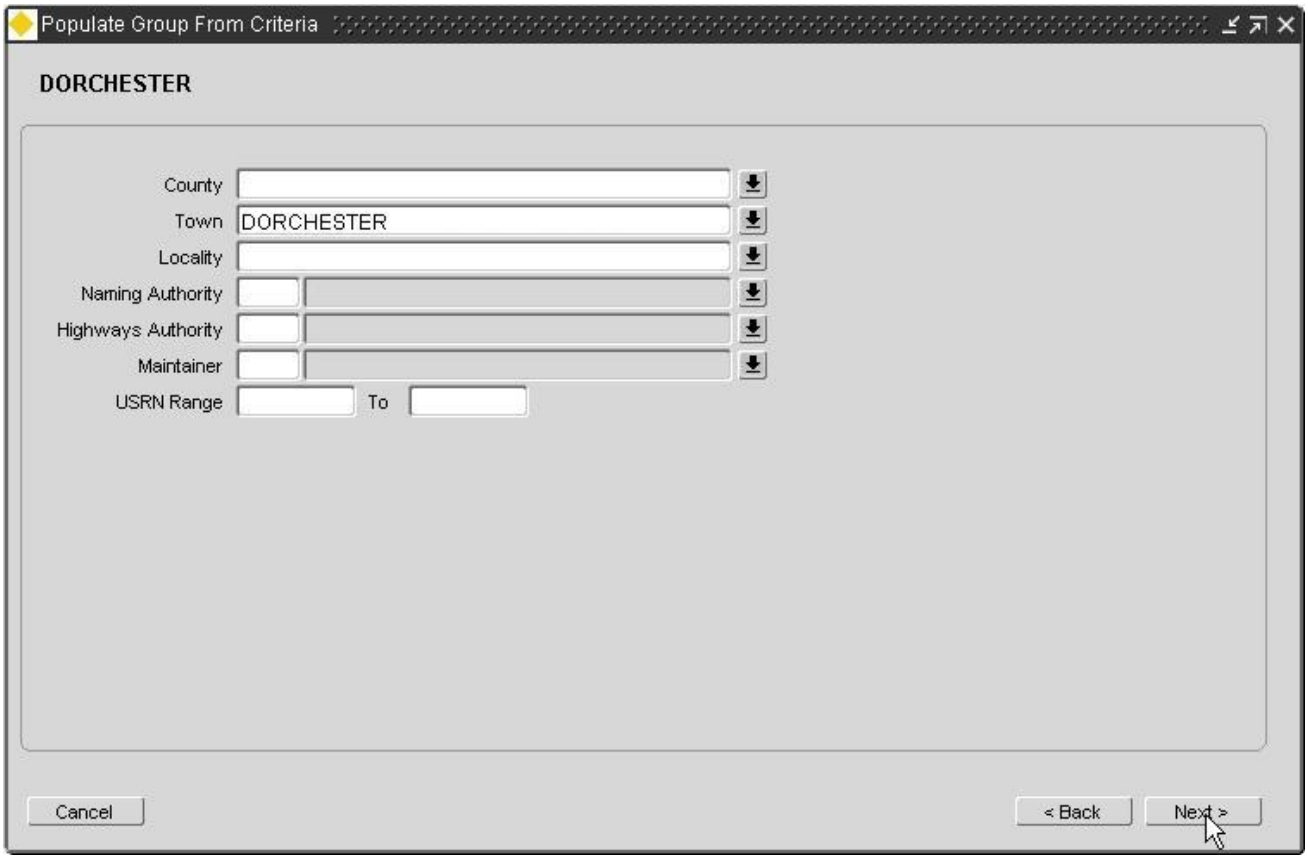

Figure 95 - Populate Group Form

Use the criteria available to restrict the streets that are to be added to the street group.

County	***Optional***	***List***

Enter the county from which the streets are to be selected.

Town	***Optional***	***List***

Enter the town from which the streets are to be selected.

Locality	***Optional***	***List***

Enter the locality from which the streets are to be selected.

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Naming Authority	*Optional*	*List*

Enter the naming authority to select the streets belonging to that authority.

Highways Authority	*Optional*	*List*

Enter the highways authority to select the streets belonging to that authority.

Maintainer	*Optional*	*List*

Enter the maintainer to select the streets belonging to that authority.

USRN Range	*Optional*

Enter the start of the USRN range from which the streets are to be selected.

To	*Optional*

Enter the end of the USRN range from which the streets are to be selected.
To go on to the next step in creating a new street group press the [**Next**] button.
This will call the *Append to Group* window.

8.2.2.3 Append to Group

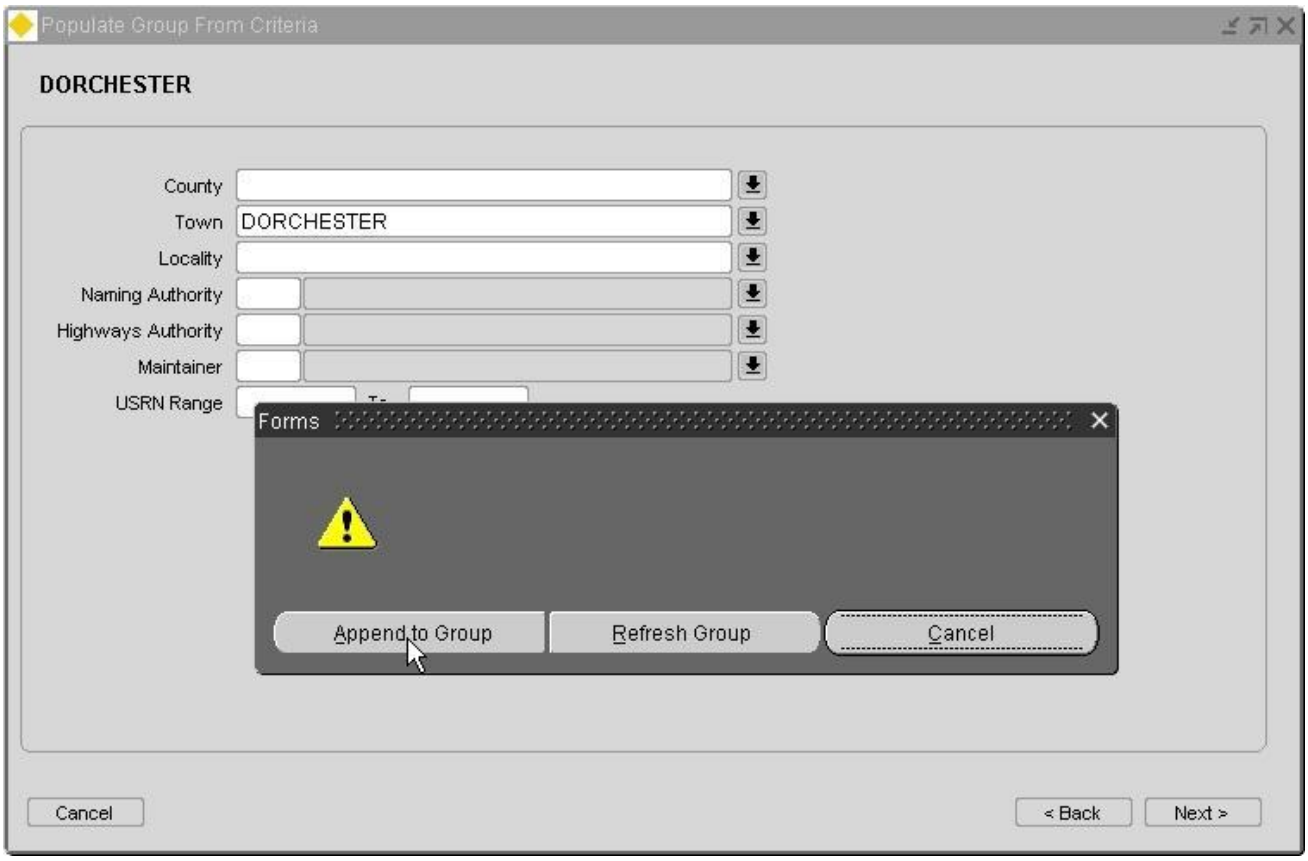

Figure 96 – Append to Group

Select the [**Append to Group**] option to add the new streets to the existing street group.

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Select the [**Refresh Group**] option to replace the existing streets within the street group with the new selection of streets.

This will call the *Street Group Members* window.

Further streets can be added at this point by selecting a street from the Streetworks gazetteer. This can be achieved in two ways.

Select the [**Create Record**] button on the toolbar then:

- Enter a street name or part of a street name in the *Description* field and press the [**Enter**] key.
- Press the 'drop down list' icon.

This will call the *View Streets – TMA1340* module.

8.2.2.4 View Streets

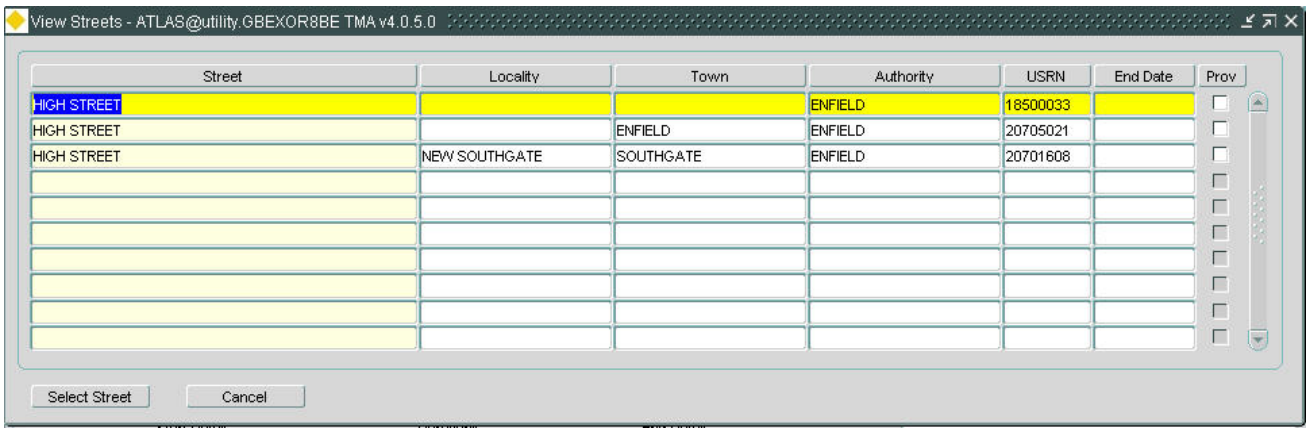

Figure 97 – View Streets

If a street name or part of a street name was entered into the *Street Groups Members* window only streets matching these values will be displayed.

If he 'drop down list' icon was used to call the *View Streets* module then all streets will be displayed. Identify the street to be added to the street group then press the [**Select Street**] button. This will call the *Street Group User* window.

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8.2.3 Sorting Results

Results within the form may be sorted by any of the displayed fields by pressing the field name (column heading) which are also 'Sort' buttons. The first time a heading is pressed the records are sorted in ascending order. If pressed again the records within the column will be sorted in descending order. A 'carat' (^) symbol or lower case 'v' is displayed adjacent to the column name to indicate that the data has been sorted in ascending or descending order respectively as shown below.

Locality	Town v
	WRIGHTINGTON
	SKELMERSDALE
	RISHTON
	PRESTON
	PADIHAM
	OSWALDTWISTLE
	NELSON
	MAWDESLEY
	LANCASTER
	HASLINGDEN

Locality	Town ^
OSWALDTWISTLE	ACCRINGTON
	ACCRINGTON
	BRIERFIELD
	CHORLEY
	CLITHEROE
	COLNE
	ELSWICK
	FLEETWOOD
	GARSTANG
	GREAT ECCLESTON

Figure 98 - Sort Results

Streets can be removed from the street group by selecting the street and pressing the [**Delete Record**] on the toolbar. To go on to the next step in amending the street group press the [**Next**] button.

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8.2.3.1 Street Group User

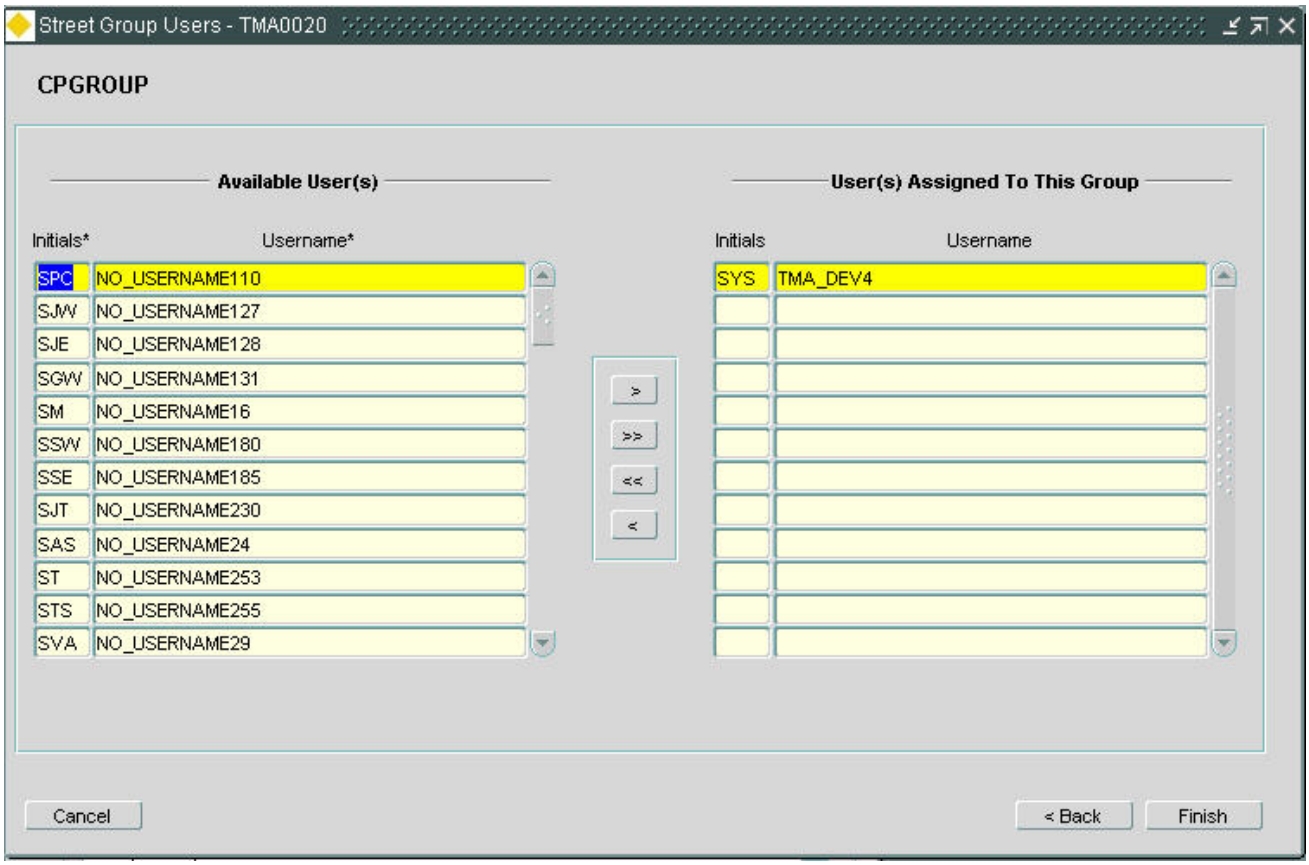

Figure 99 - Street Group User

Use this form to assign other users to this group. As default, the user that created the new street group will be assigned to the group.

To assign another user to the group:

1. In the *Available User(s)* side of the form identify and highlight the user to be assigned to the street group.
2. Select the [>] button to move the user into the *User(s) Assigned To This Group* part of the form.
3. To move all users across select the [>>] button.

To remove a user from the group:

1. In the *User(s) Assigned To This Group* part of the form highlight the user to be removed from the street group.
2. Select the [<] button to move the user back to the *Available User(s)* part of the form.
3. To remove all users select the [<<] button.

Once all the steps have been taken to create the new street group press the [Finish] button.

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8.2.4 Create New Group

Figure 100 - Create New Group

Create New Group ***Optional***

Select this radio button to create a new street group.

Name ***Mandatory***

Enter a name for the new street group.

To go on to the next step in creating a new street group press the [**Next**] button. This will call the *Populate Group From Criteria* window.

8.2.4.1 Populate Group Form

Use the criteria available to restrict the streets that are to be added to the new street group.

County ***Optional*** ***List***

Enter the county from which the streets are to be selected.

Town ***Optional*** ***List***

Enter the town from which the streets are to be selected.

Locality ***Optional*** ***List***

Enter the locality from which the streets are to be selected.

Naming Authority ***Optional*** ***List***

Enter the naming authority to select the streets belonging to that authority.

Highways Authority ***Optional*** ***List***

Enter the highways authority to select the streets belonging to that authority.

Maintainer ***Optional*** ***List***

Enter the maintainer to select the streets belonging to that authority.

USRN Range ***Optional***

Enter the start of the USRN range from which the streets are to be selected.

To ***Optional***

Enter the end of the USRN range from which the streets are to be selected.

To go on to the next step in creating a new street group press the [**Next**] button.

This will call the *Append to Group* window.

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8.2.4.2 Append to Group

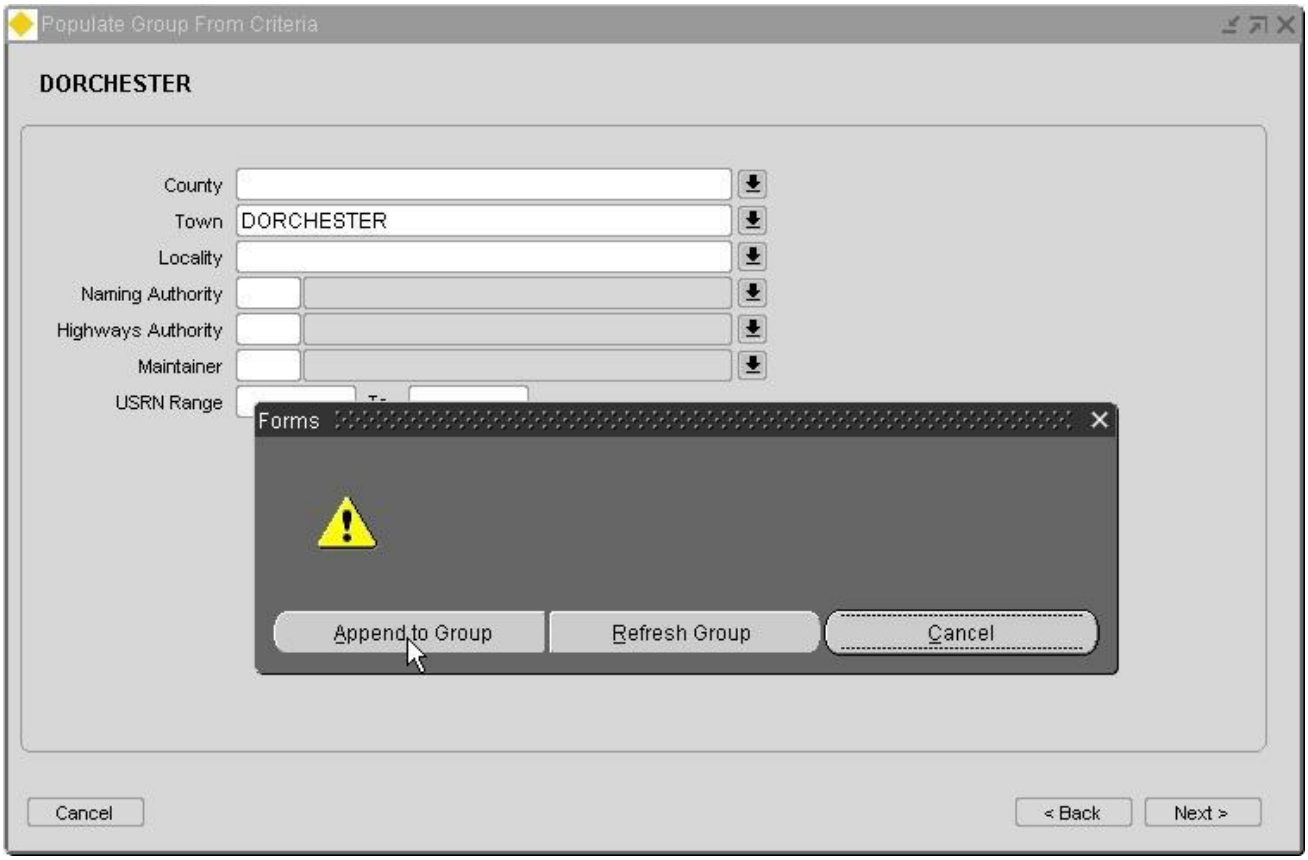

Figure 101 - Append to Group

Select the [**Append to Group**] option to continue to create the new street group.
This will call the Street Group Members window.

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8.2.4.3 Street Group Members

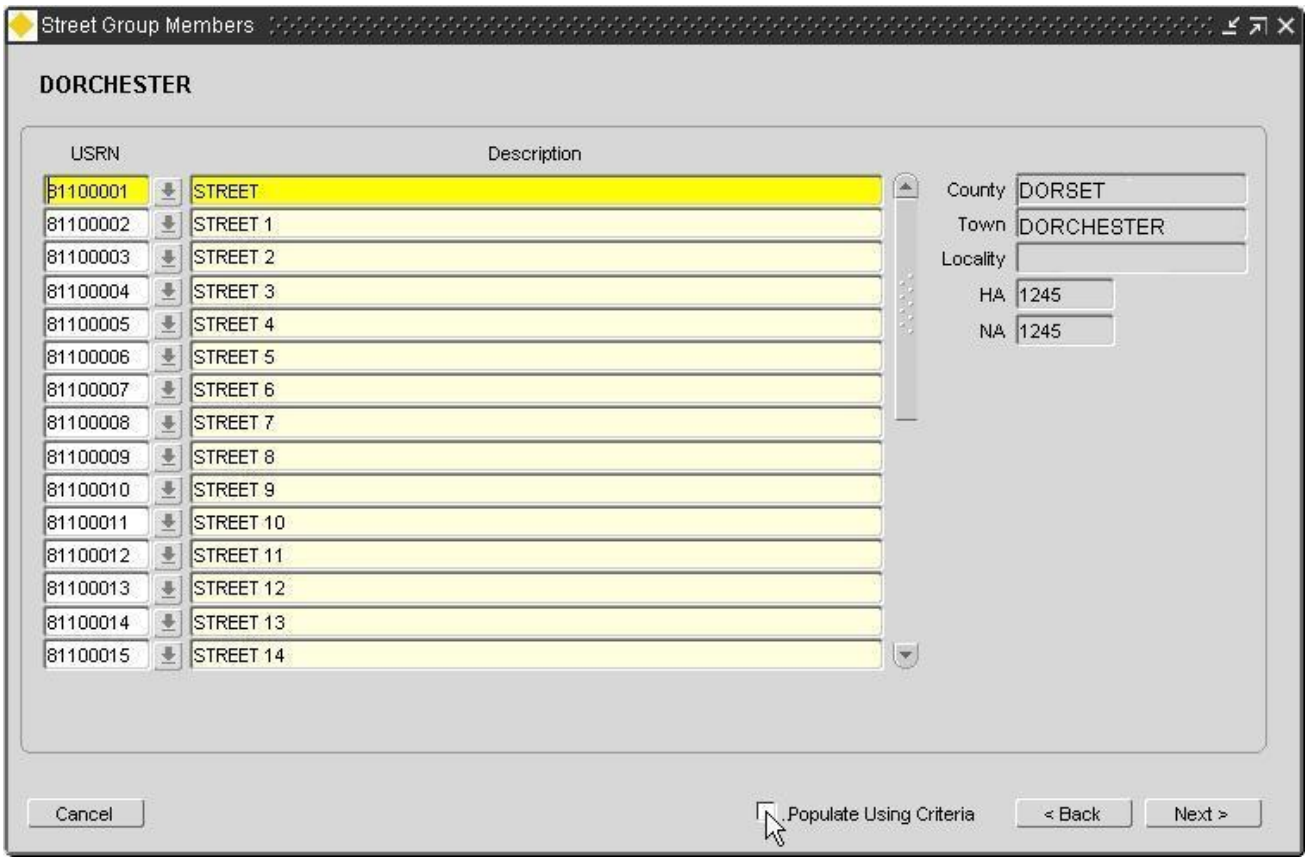

Figure 102 – Street Group Members

From this window it is possible to add further streets to the new street group. Streets can be removed from the group by selecting the [**Delete Record**] button.

To add further streets to the new street group either:

1. Select criteria in the *Populate Groups From Criteria* window.
   - To do this tick the *Populate Using Criteria* checkbox and press the [**Next**] button.

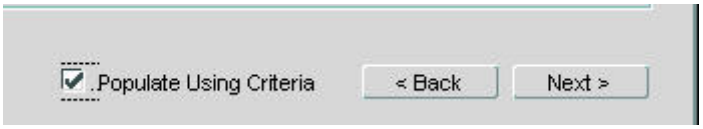

Figure 103 – Populate Using Criteria

2. Select a street from the Streetworks gazetteer with the [**Create Record**] button on the toolbar then either:
   - Enter a street name or part of a street name in the *Description* field and press the [**Enter**] key.

   or
   - Press the 'drop down list' icon.

This will call the *View Streets – TMA1340* module.

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8.2.4.4 View Streets

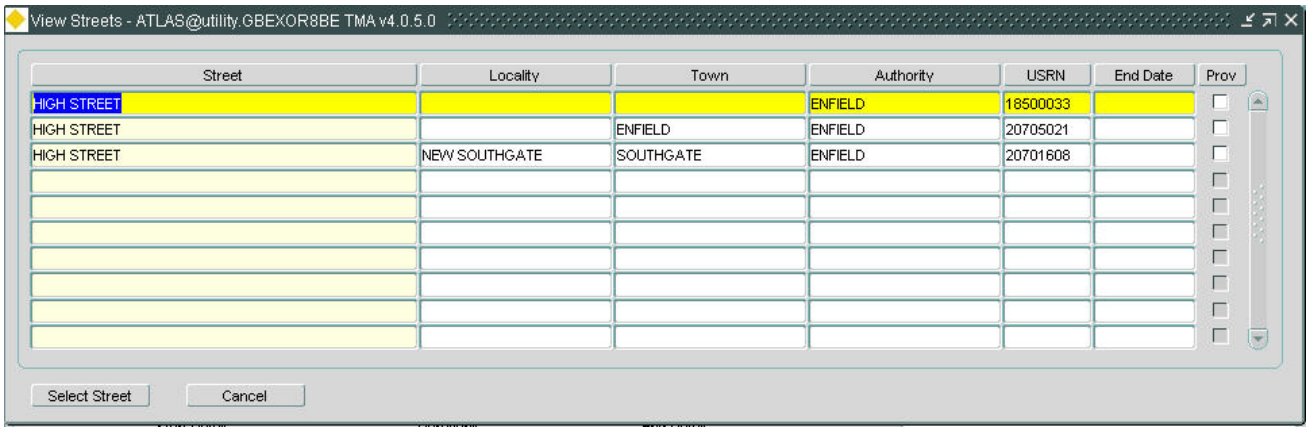

Figure 104 - View Streets

If a street name or part of a street name was entered into the *Street Groups Members* window only streets matching these values will be displayed.

If he 'drop down list' icon was used to call the *View Streets* module then all streets will be displayed. Identify the street to be added to the street group then press the [**Select Street**] button. This will call the *Street Group User* window.

8.2.5 Sorting Results

Results within the form may be sorted by any of the displayed fields by pressing the field name (column heading) which are also 'Sort' buttons. The first time a heading is pressed the records are sorted in ascending order. If pressed again the records within the column will be sorted in descending order. A 'carat' (^) symbol or lower case 'v' is displayed adjacent to the column name to indicate that the data has been sorted in ascending or descending order respectively as shown below.

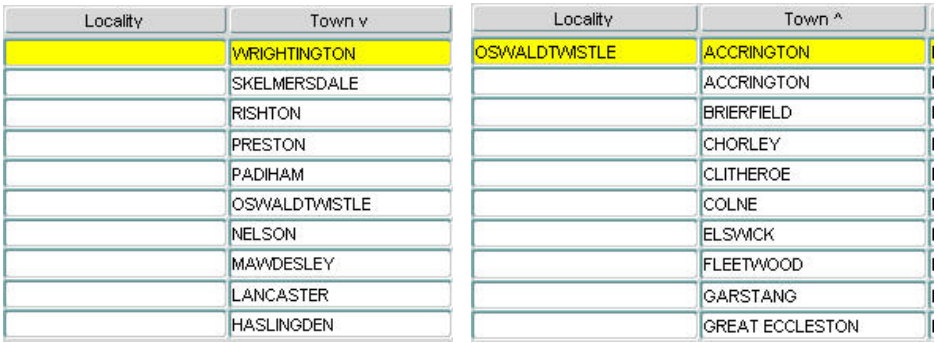

Figure 105 - Sort Results

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8.2.5.1 Street Group User

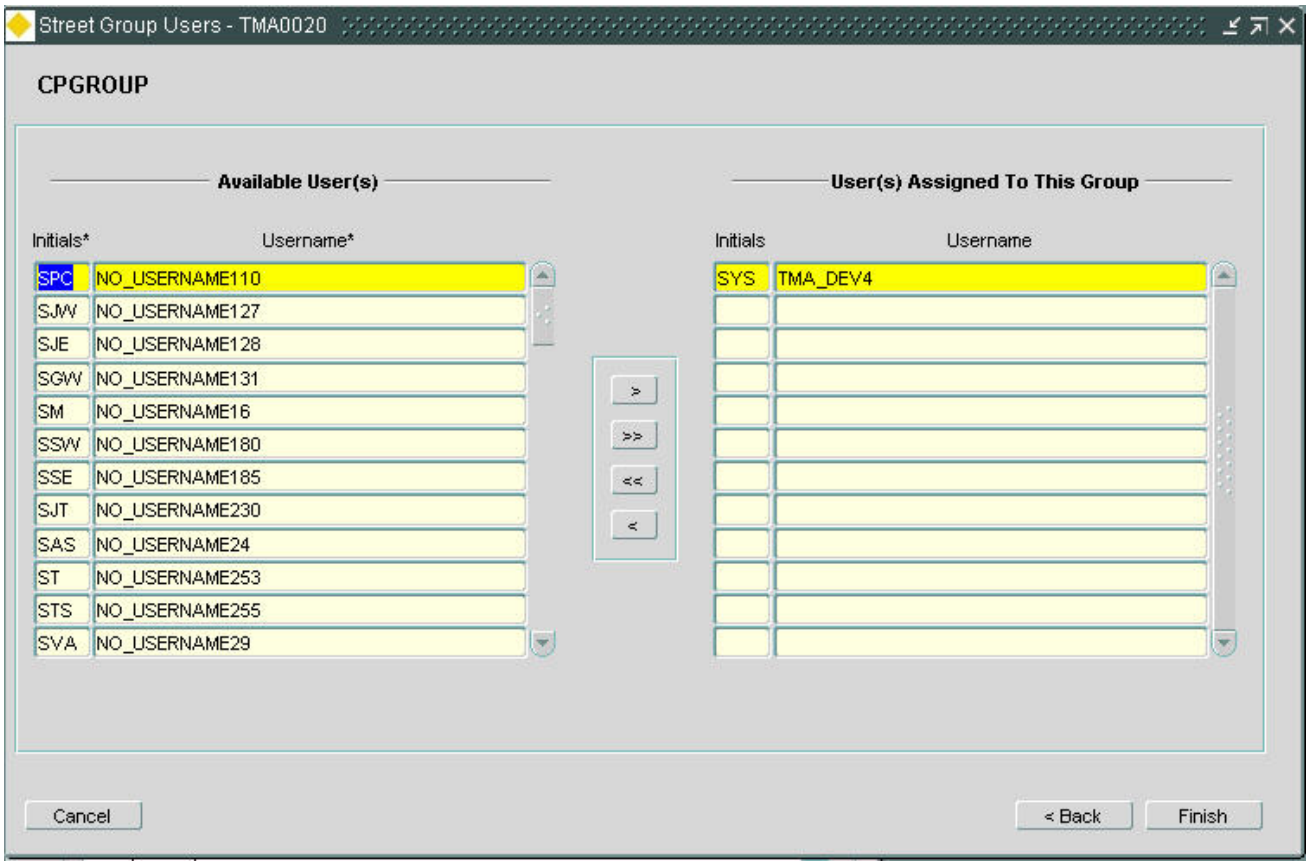

Figure 106 - Street Group User

Use this form to assign other users to this group. As default, the user that created the new street group will be assigned to the group.

To assign another user to the group:

1. In the *Available User(s)* side of the form identify and highlight the user to be assigned to the street group.
2. Select the [>] button to move the user into the *User(s) Assigned To This Group* part of the form.
3. To move all users across select the [>>] button.

To remove a user from the group:

1. In the *User(s) Assigned To This Group* part of the form highlight the user to be removed from the street group.
2. Select the [<] button to move the user back to the *Available User(s)* part of the form.
3. To remove all users select the [<<] button.

Once all the steps have been taken to create the new street group press the [**Finish**] button.

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8.3 Unassigned Streets – TMA0030

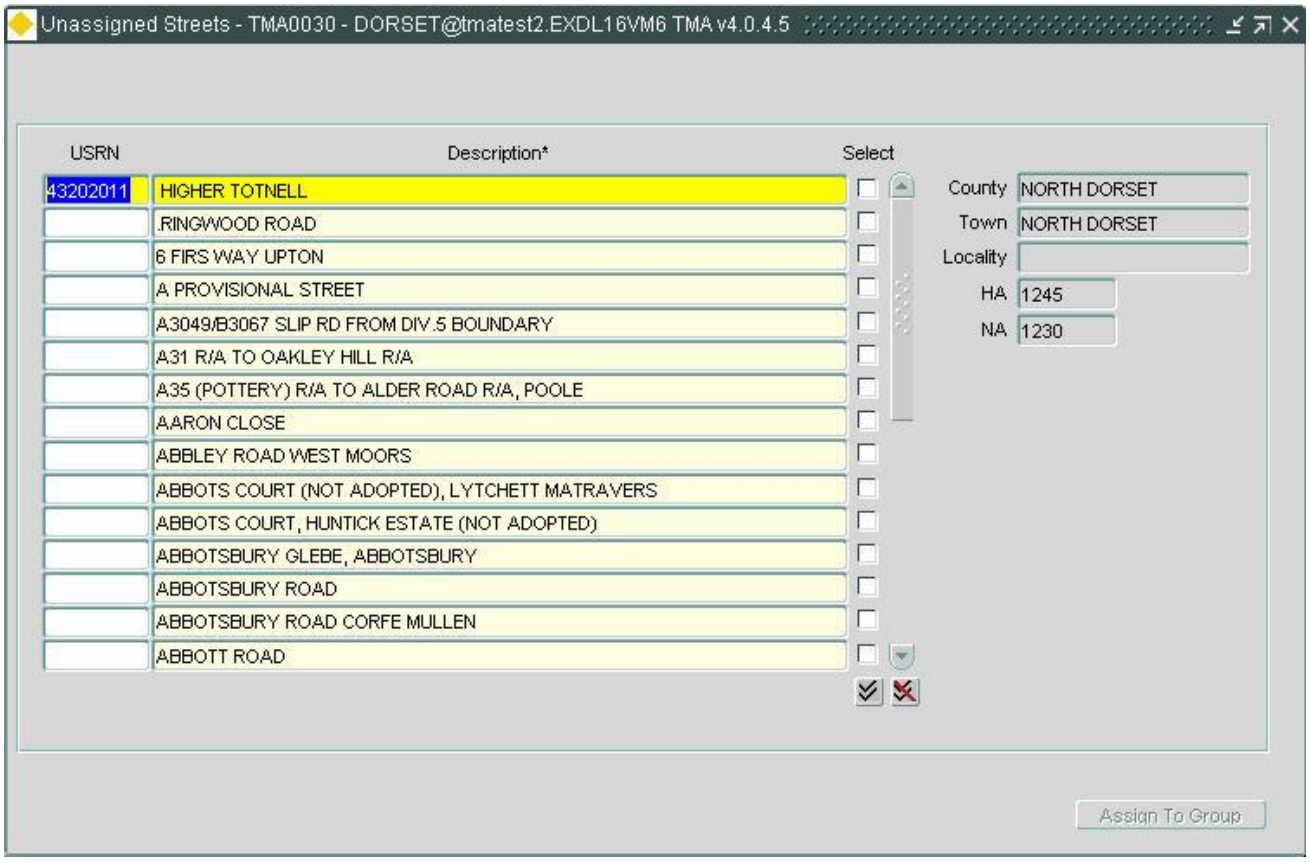

Figure 107 - Unassigned Streets

8.3.1 General Information

The *Unassigned Streets* form will list all streets in the Streetworks gazetteer that do not currently belong to a street group.

Note: A street must belong to at least one street group in order to view the data associated with the street. This includes provisional streets.

This form allows an unassigned street to be selected and assigned to a current street group using the [Assign To Group] button. This will call the *Street Groups – TMA0020* form.

8.3.2 Unassigned Streets

USRN ***Display Only***

The USRN of the unassigned street will be displayed.

Description ***Display Only***

The name of the street will be displayed.

Select ***Checkbox***

Check this box in order to assign the street to a street group.

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County ***Display Only***

The county associated with the street will be displayed.

Town ***Display Only***

The town associated with the street will be displayed.

Locality ***Display Only***

The locality associated with the street will be displayed.

HA ***Display Only***

The highway authority associated with the street will be displayed.

NA ***Display Only***

The naming authority associated with the street will be displayed.

Select the [**Assign to Group**] button to assign the selected streets to a street group.

A warning message will appear.

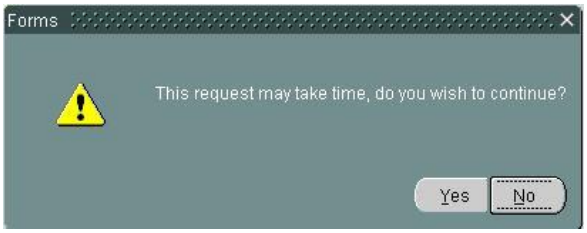

Figure 108 - Warning

The *Street Groups – TMA0020* form will appear allowing the user to add the selected streets to an existing street group or create a new street group.

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8.4 User Street Groups – TMA0040

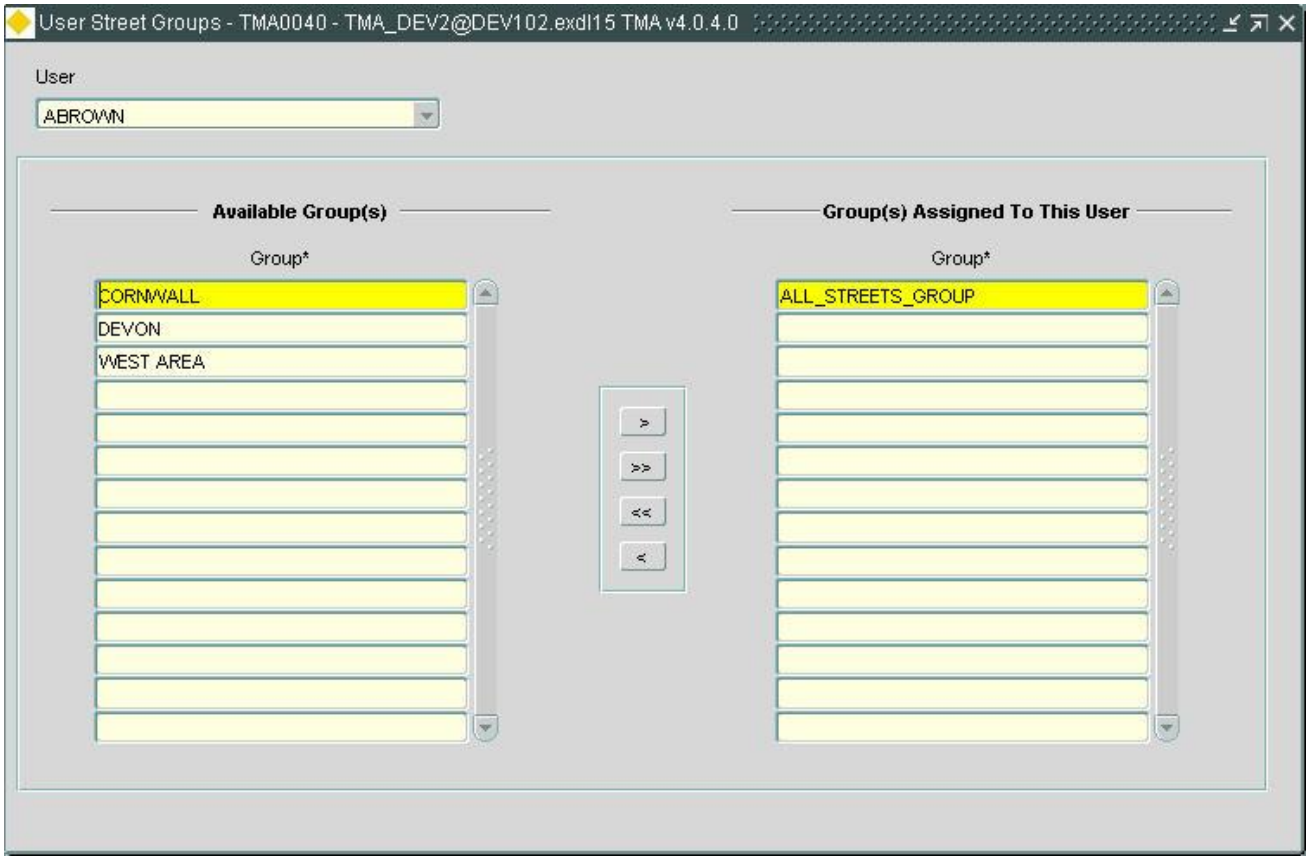

Figure 109 - User Street Groups

8.4.1 General Information

The *User Street Groups* form allows the System Administrator to assign street groups to a user. This will allow the user to view or amend data associated with the street.

For example: an inspector may only be interested in streets in a particular area. If these streets were associated with a street group then the administrator would assign the group to the inspector. The inspector then would only be able to view notices and do inspections on these particular streets.

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8.4.2 User Street Groups

To assign groups to a user:

User	*Mandatory*	*List*

Enter the user to which the street group is to be assigned.
Available Group(s) part of the form:

Groups	*Display Only*

Highlight the group to be assigned to the user.
Select the [>] button to move the group into the *Group(s) Assigned To This User* part of the form.
To move all groups across select the [>>] button.
To remove a group from a user:
Group(s) Assigned To This User part of the form:

Group	*Display Only*

Highlight the group to be removed from the user.
Select the [<] button to move the group back to the *Available Group(s)* part of the form.
To remove all groups select the [<<] button.

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8.5 My Street Groups – TMA0050

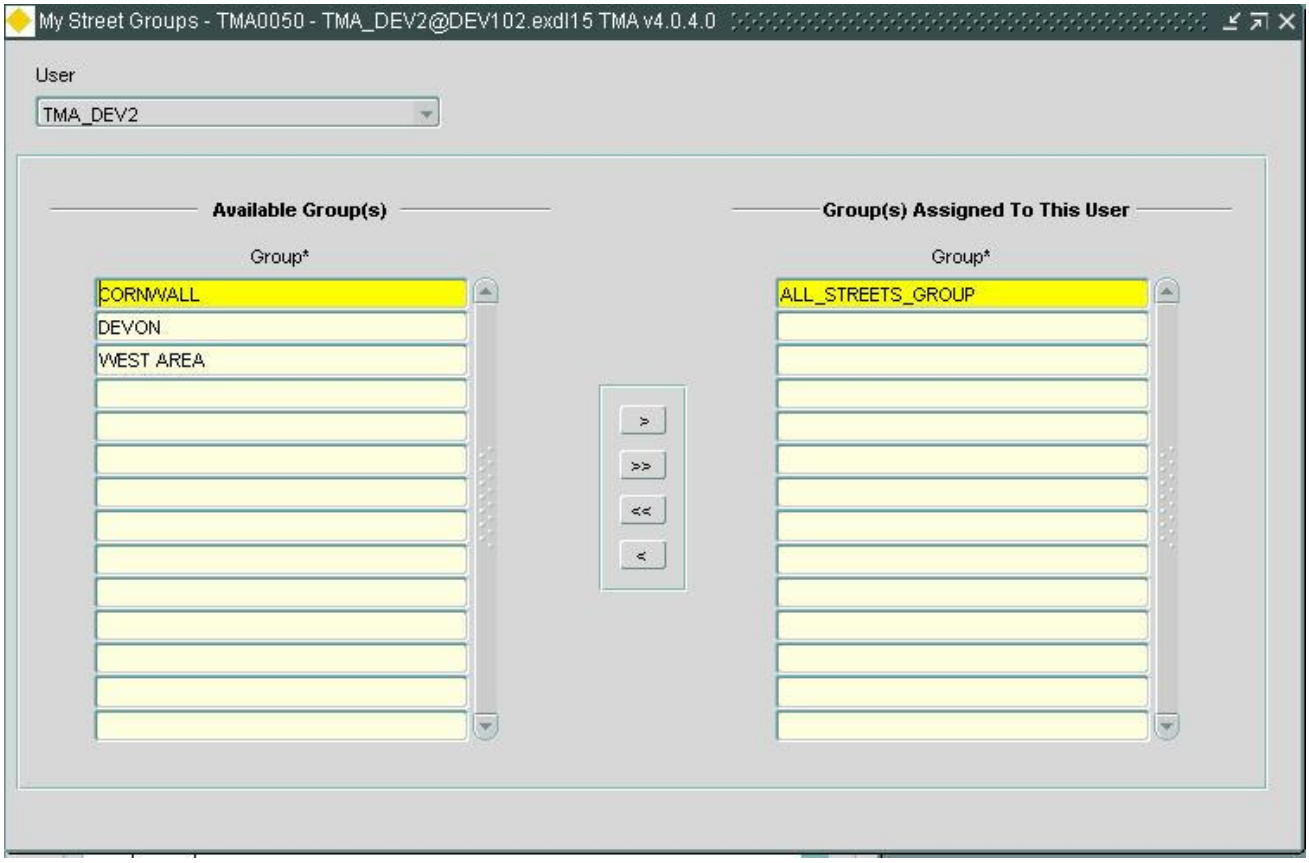

Figure 110 - My Street Groups

8.5.1 General Information

The *My Street Groups* form allows a user to view the street groups assigned to the user by the System Administrator.

The user can move street groups between *Available Group(s)* and *Group(s) Assigned to This User*.

For example: if an inspector is to cover another inspector's area, the street group for that area can be moved to the *Group(s) Assigned to This User* for the period of the cover.

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8.5.2 My Street Groups

To assign groups to the user:

User ***Display Only***

The username of the user logged on to the system will be displayed.

The Available Group(s) part of the form will display all groups that have been assigned to the user by the System Administrator.

Groups ***Display Only***

Highlight the group to be assigned to this user.

Select the [>] button to move the group into the *Group(s) Assigned To This User* part of the form.

To move all groups across select the [>>] button.

To remove a group from the user:

Group(s) Assigned To This User part of the form:

Group ***Display Only***

Highlight the group to be removed from this user.

Select the [<] button to move the group back to the *Available Group(s)* part of the form.

To remove all groups select the [<<] button.

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8.6 Administer User Districts – NSG0120

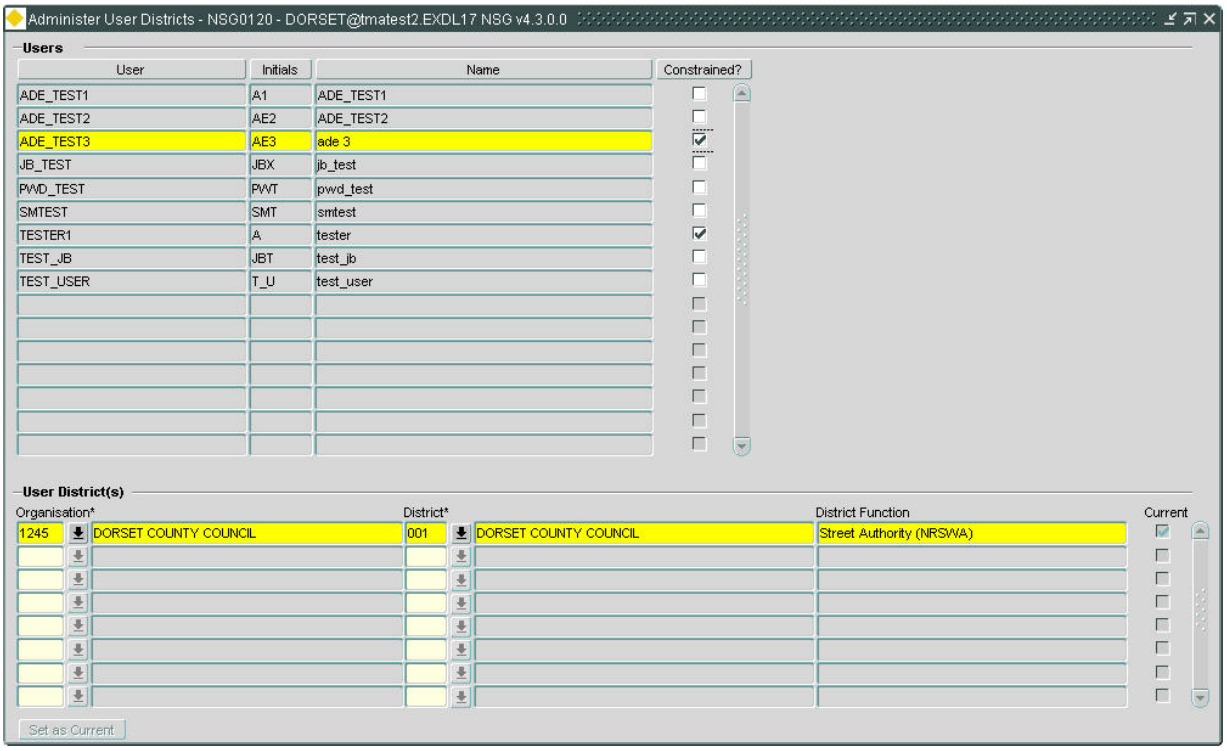

Figure 111 – Administer User Districts

8.6.1 General Information

The *Administer User Districts* form enables the System Administrator to define which operational districts are available to a specific user.

For example: a user may perform the function of a street authority and monitor notices coming in from a works promoter. The same user may also perform the function of a works promoter and enter notices on behalf of the highway authority.

The user then has the option of swapping from one district function to another by using the *My Districts – NSG0130* form.

The *Administer User Districts* form is available from either the Street Gazetteer Manager menu or the TMA Manager menu.

A user can be constrained to the districts defined in their user districts. In form *Works – TMA1000* a user that is constrained can raise works only against the organisations and districts that they can represent. However, the form will still query back works for all organisations and districts.

For a user that is constrained but is dealing with works that has not been promoted by one of their organisation and districts the *Noticing Assistant – TMA1001* will restrict the types of notices that can be sent.

It will only the following notice types to be sent under the appropriate circumstances:

- Works Comment – TMA1500
- Unattributable Works Response – Acceptance – TMA2000
- Unattributable Works Response -Non Acceptance – TMA2001

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8.6.2 Users

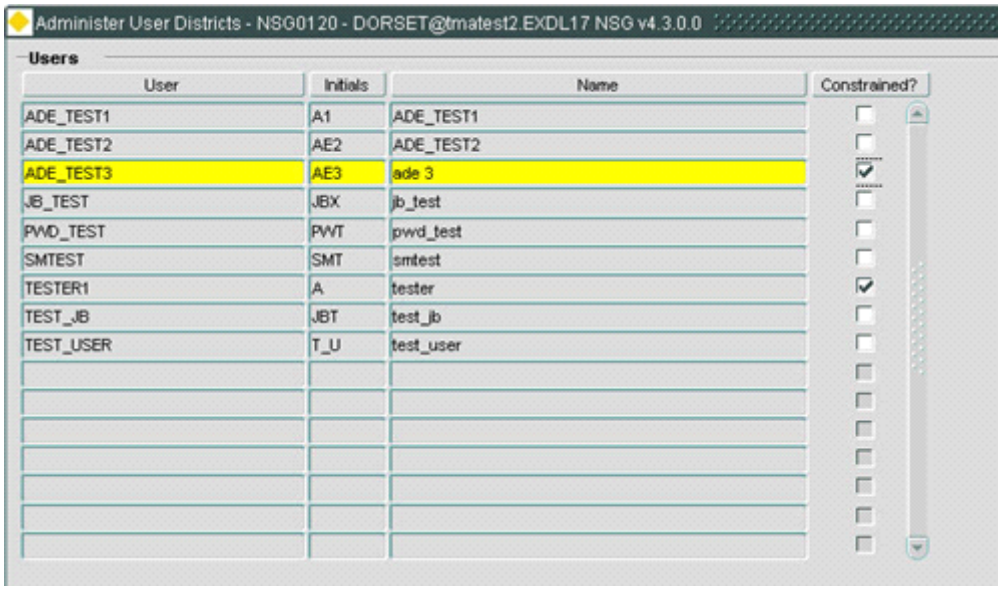

Figure 112 - Users

User	***Display Only***

The username of the user as defined in form *Users – HIG1832* will be displayed.

To set up a user refer to the General System Administration Guide

Initials	***Display Only***

The initials of the user as defined in form *Users – HIG1832* will be displayed.

Name	***Display Only***

The name of the user as defined in form *Users – HIG1832* will be displayed.

Constrained?	***Checkbox***

This checkbox is used to define whether the user is constrained to the districts defined in the 'User Districts' part of the form.

If this box is checked the user is prevented from amending/inserting data into form *Works – TMA1000* for a district other than the one(s) they are associated with.

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8.6.3 User Districts

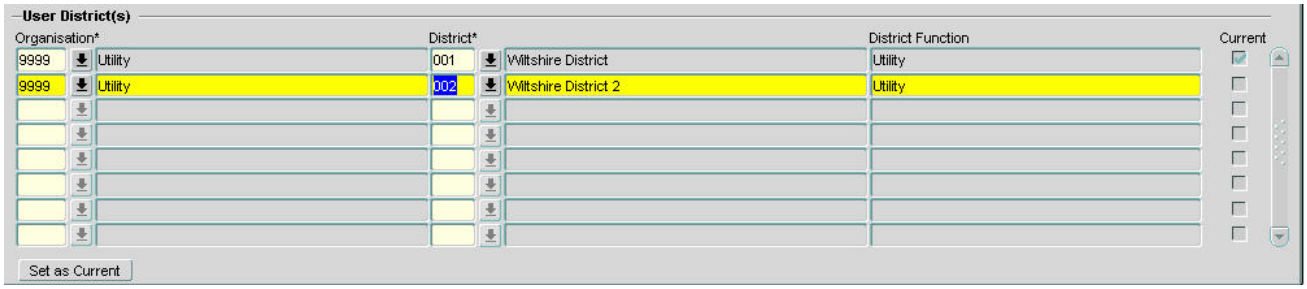

Figure 113 - User Districts

Organisation ***Optional*** ***List***

Enter the organisation to be available to the selected user.

District ***Optional*** ***List***

Enter the organisational district to be available to the selected user.

District Function ***Display Only***

The function of the selected district will be displayed.

Current ***Checkbox***

The current district assigned to the user will be checked.
Use the [**Set as Current**] button to change the current district.

Figure 114 – Set as Current button

Note: The new district must be selected before the [**Set as Current**] button is available.
The following alert prevents the district being changed for a user.

Forms
NSG-0088: A module is currently open which prevents the district for this user being amended. Close relevant module and try again.
TMA5000-Inspections
OK
Cancel

Figure 115 - User Districts

All forms should be closed before changing the district of the user.

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8.7 My Districts – NSG0130

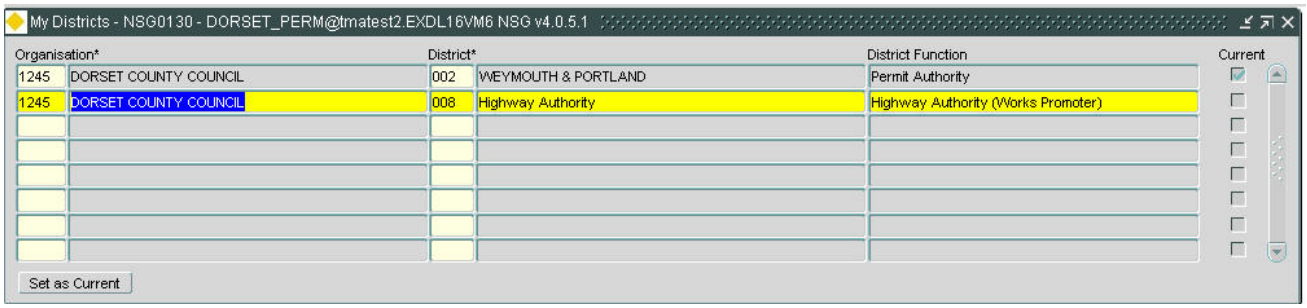

Figure 116 – My Districts

8.7.1 General Information

The *My Districts* enables the user to define which operational district they are currently using. The user can swap between the district functions assigned to the user by the System Administrator.

For example: a user may perform the function of a street authority and monitor notices coming in from a works promoter. The same user may also perform the function of a works promoter and enter notices on behalf of the highway authority.

For a user that is dealing with works under both NRSWA and PERMIT the system will automatically temporarily switch districts on the fly when the Noticing Assistant is called to send a notice. Once the Noticing Assistant is closed down the user will revert back to their original district.

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8.7.2 My Districts

Organisation ***Display Only***

The organisation set as available to the selected user will be displayed.

District ***Display Only***

The organisational district set as available to the selected user will be displayed.

District Function ***Display Only***

The function of the selected district will be displayed.

Current ***Checkbox***

The current district assigned to the user will be checked.
Use the [**Set as Current**] button to change the current district.

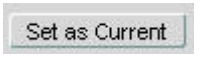

Figure 117 – Set as Current button

Note: The new district must be selected before the [**Set as Current**] button is available.

Note: All forms should be closed before changing the district.

The following alert prevents the district being changed for a user.

Forms
NSG-0088: A module is currently open which prevents the district for this user being amended. Close relevant module and try again.
TMA5000-Inspections
OK
Cancel

Figure 118 - My Districts

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9 Activities

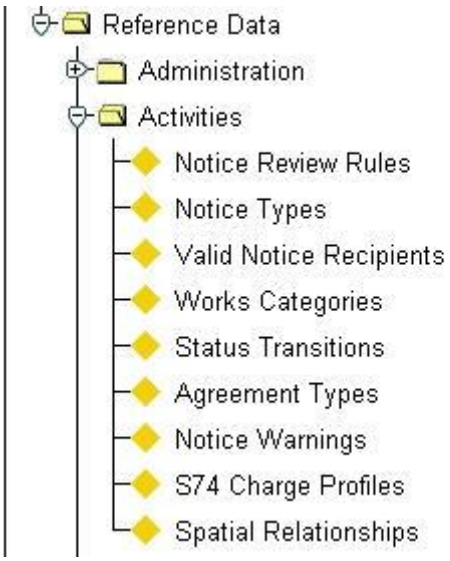

Figure 119 – Activities Menu

This chapter describes the forms and processes used for the administration of metadata in **TMA by Exor**. They are the following forms:

- Notice Review Rules – TMA2000
- Notice Types – TMA2010
- Valid Notice Recipients – TMA2015
- Works Categories – TMA2020
- Status Transactions – TMA2030
- Agreement Types – TMA2040
- Notice Warnings – TMA2050
- S74 Charge Profiles – TMA2060
- Spatial Relationships – TMA2065

The form descriptions provide you with detailed information about each TMA Works form in **TMA by Exor**, including:

- an overall description of the form
- a detailed explanation of each field, including available features (such as List of Values), default values and other characteristics
- helpful information for using the form

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9.1 Notice Review Rules – TMA2000

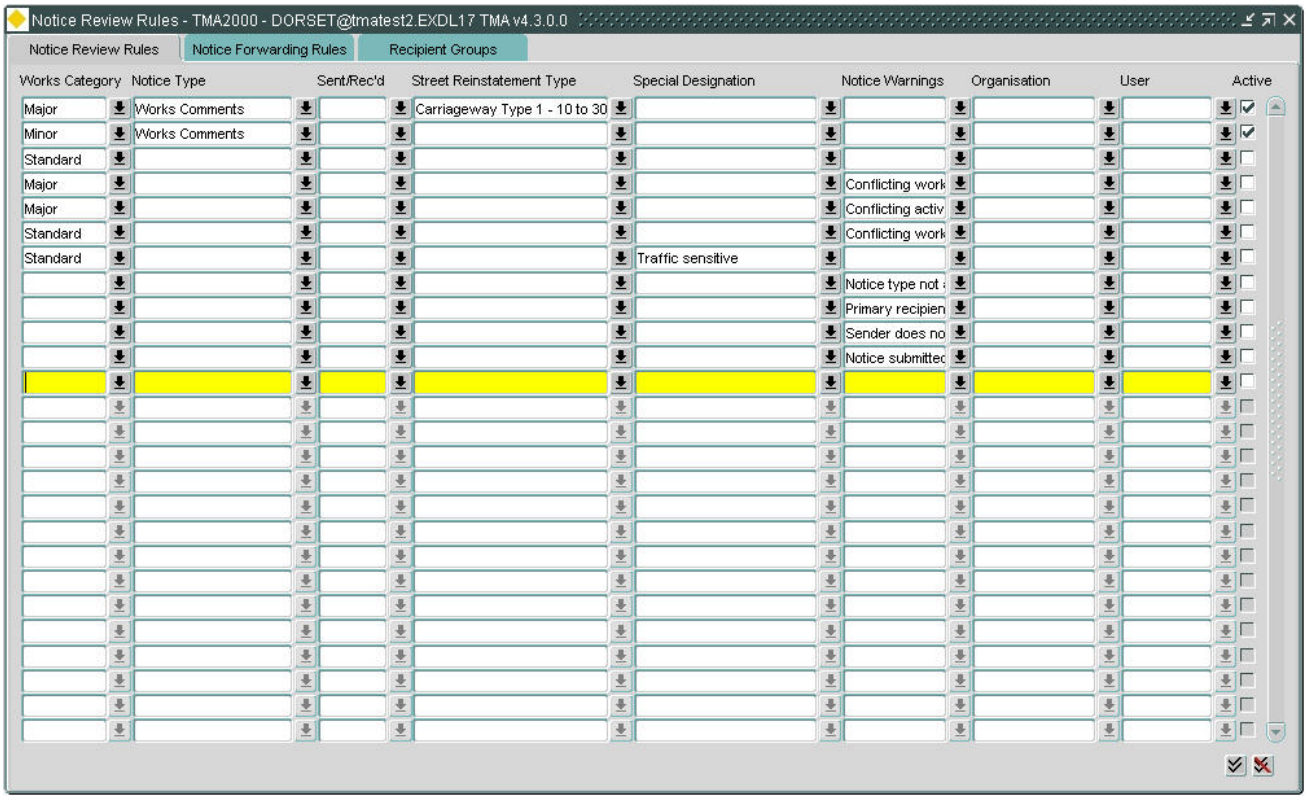

Figure 120 - Notice Review Rules

9.1.1 General Information

This form is used to set up notice review rules. Different rules may apply to notices being sent or received.

If a notice matches any of the appropriate rules then that notice will be flagged as requiring a review.

When a notice is sent, if any rules are matched then the notice is not sent via the Web Service until the reviewer allows it.

When a notice is received, if any rules are matched then the notice can be reviewed but no other processing on the works is stopped.

If the **Product Option - FWD_NOTICE** is set to Y then the Notice Forwarding Rules tab will appear. This tab allows the definition of Notices that are required to be forwarded to one or more Organisation/District.

The forwarding process will apply to any received transactions that match the criteria.

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9.1.2 Notice Review Rules

Works Category ***Optional*** ***List***

Enter the works category for the notice review rule.

Notice Type ***Optional*** ***List***

Enter the notice type for the notice review rule.

Sent ***Optional*** ***List***

Indicate if the notice review rule applies to notices being sent or notices being received.

Street Reinstatement Type ***Optional*** ***List***

Enter the street reinstatement type for the street for the notice review rule.

Special Designation ***Optional*** ***List***

Enter the special designation of the street for the notice review rule.

Notice Warning ***Optional*** ***List***

Enter the notice warning for the notice review rule.

Organisation ***Optional*** ***List***

Enter the organisation for the notice review rule.

User ***Optional*** ***List***

Enter the user that created the notice for the notice review rule.

Active ***Optional/Checkbox***

Tick the checkbox to indicate that the notice review rule is active.

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9.1.3 Notice Forwarding Rules

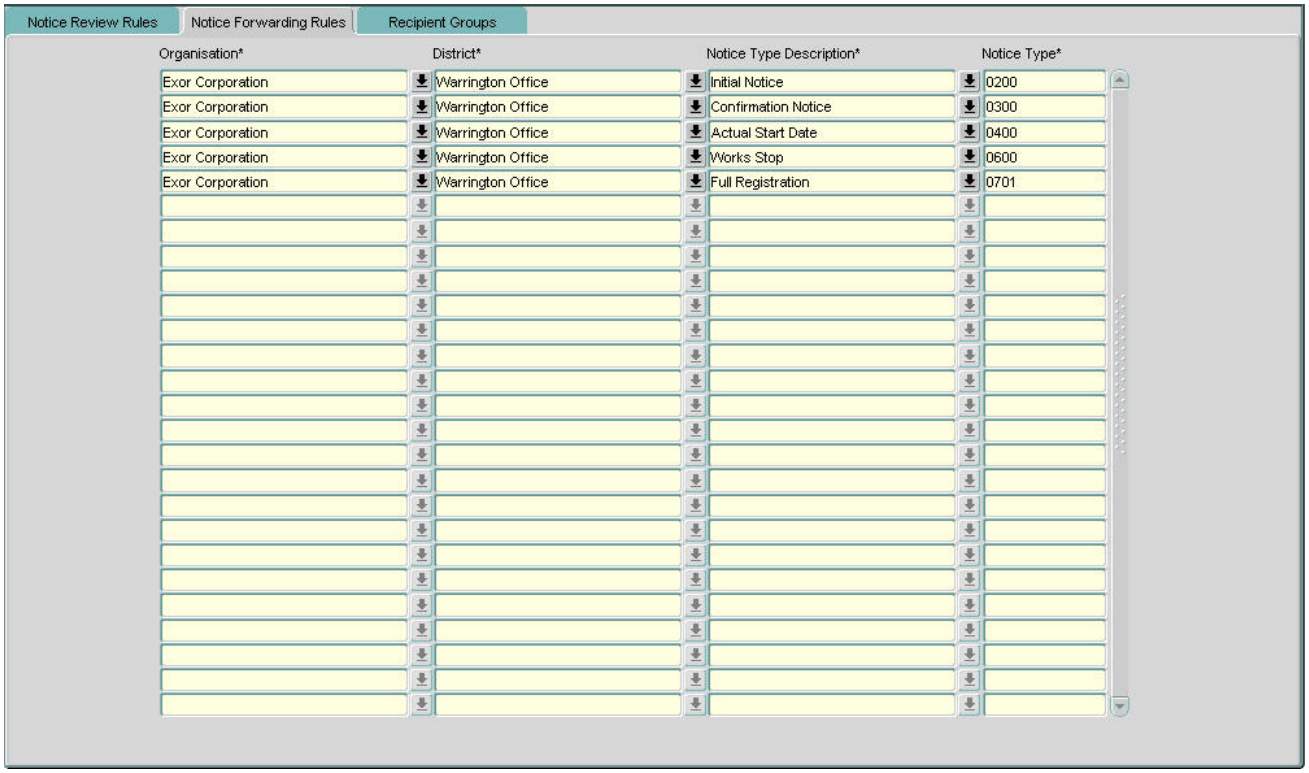

Figure 121 - Notice Forwarding Rules

Organisation	***Mandatory***	***List***

Enter the Organisation for the notice forwarding rule.

District	***Mandatory***	***List***

Enter the Organisations District for the notice forwarding rule.

Notice Type Description	***Mandatory***	***List***

Enter the notice type description for the notice forwarding rule.

Notice Type	***Display Only***

The notice type will be displayed.

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9.1.4 Recipient Groups

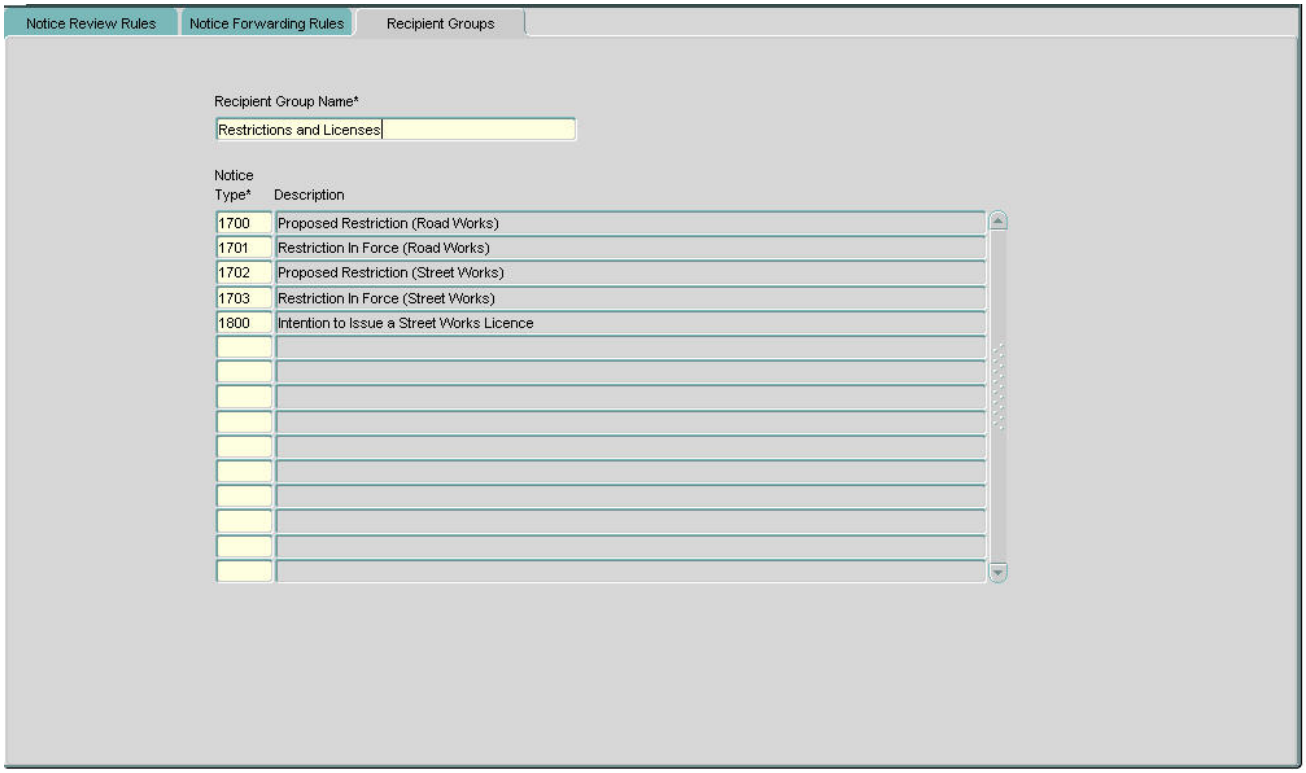

Figure 122 - Recipient Groups

The Recipient Groups tab will display the recipient group information used in form *Valid Notice Recipients – TMA2015*. This information is display only and cannot be changed.

Recipient Group Name ***Display Only***

This field will display 'Restrictions and Licenses'.

Notice Type(s) ***Display Only***

This field will display the notice types relating to restrictions.

Description ***Display Only***

A description of the notice type will be displayed.

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9.2 Notice Types – TMA2010

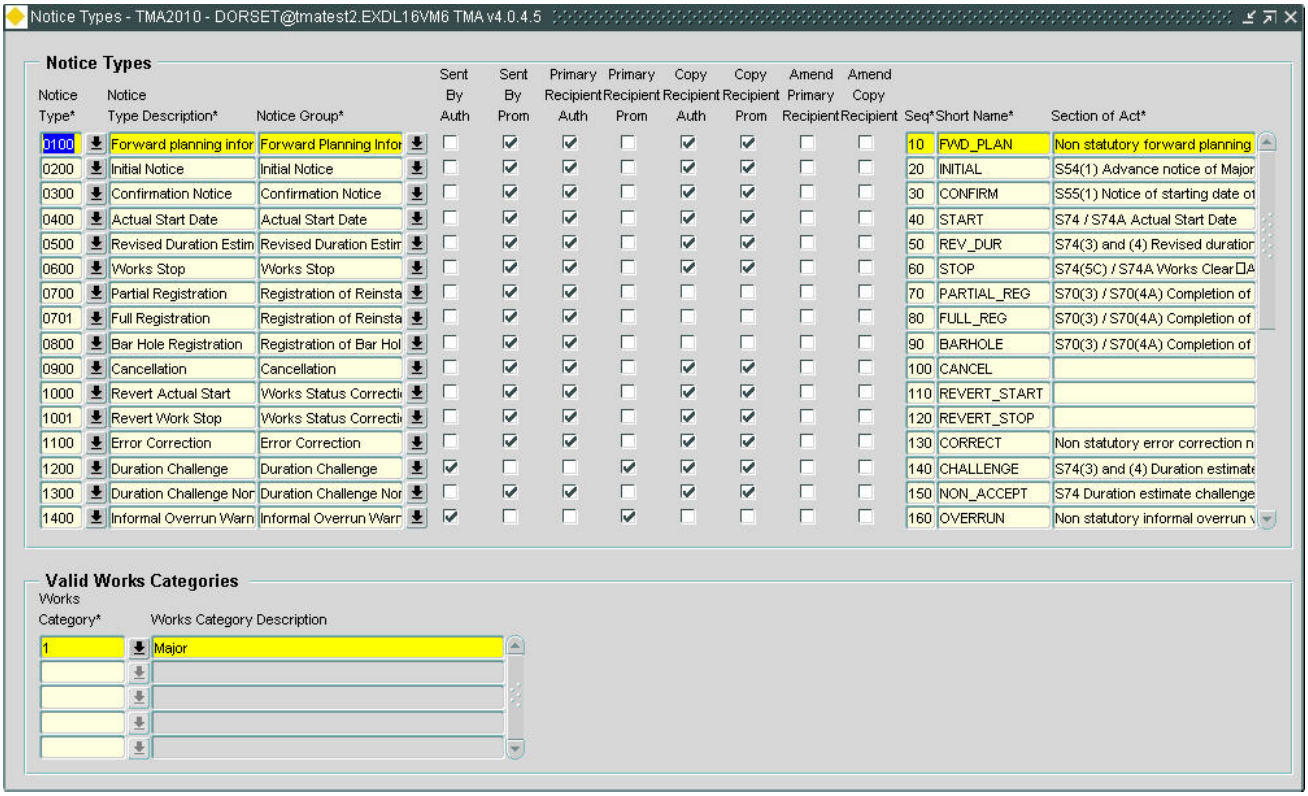
Notice Types - TMA2010 - DORSET@tmatest2.EXDL16VM6 TMA v4.0.4.5
Notice Types
Notice Type*
Notice Type Description*
Notice Group*
Sent By Auth
Sent By Prom
Primary Recipient Auth
Primary Recipient Prom
Copy Recipient Auth
Copy Recipient Prom
Amend Primary Recipient
Amend Copy Recipient
Seq*
Short Name*
Section of Act*
0100 Forward planning infor Forward Planning Infor 10 FWD_PLAN Non statutory forward planning
0200 Initial Notice Initial Notice 20 INITIAL S54(1) Advance notice of Major
0300 Confirmation Notice Confirmation Notice 30 CONFIRM S55(1) Notice of starting date of
0400 Actual Start Date Actual Start Date 40 START S74 / S74A Actual Start Date
0500 Revised Duration Estim Revised Duration Estim 50 REV_DUR S74(3) and (4) Revised duration
0600 Works Stop Works Stop 60 STOP S74(5C) / S74A Works Clear
0700 Partial Registration Registration of Reinsta 70 PARTIAL_REG S70(3) / S70(4A) Completion of
0701 Full Registration Registration of Reinsta 80 FULL_REG S70(3) / S70(4A) Completion of
0800 Bar Hole Registration Registration of Bar Hol 90 BARHOLE S70(3) / S70(4A) Completion of
0900 Cancellation Cancellation 100 CANCEL
1000 Revert Actual Start Works Status Correcti 110 REVERT_START
1001 Revert Work Stop Works Status Correcti 120 REVERT_STOP
1100 Error Correction Error Correction 130 CORRECT Non statutory error correction n
1200 Duration Challenge Duration Challenge 140 CHALLENGE S74(3) and (4) Duration estimate
1300 Duration Challenge Nor Duration Challenge Nor 150 NON_ACCEPT S74 Duration estimate challenge
1400 Informal Overrun Warn Informal Overrun Warr 160 OVERRUN Non statutory informal overrun
Valid Works Categories
Works Category*
Works Category Description
1 Major

Figure 123 - Notice Types

9.2.1 General Information

The notice types form identifies the types of notice that are valid with work categories.
It also defines which type of authority can send or receive the notice.

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9.2.2 Notice Types

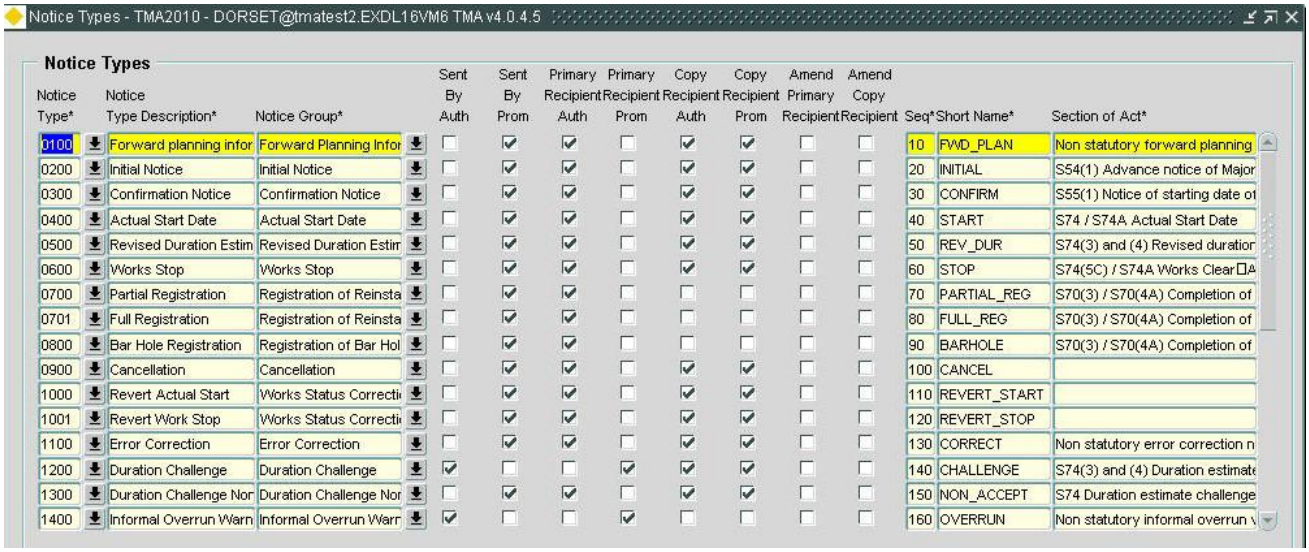
Notice Types - TMA2010 - DORSET@tmatest2.EXDL16VM6 TMA v4.0.4.5
Notice Types
Notice Type*
Notice Type Description*
Notice Group*
Sent By Auth
Sent By Prom
Primary Recipient Auth
Primary Recipient Prom
Copy Recipient Auth
Copy Recipient Prom
Amend Primary Recipient
Amend Copy Recipient
Seq*
Short Name*
Section of Act*
0100 Forward planning infor Forward Planning Infor 10 FWD_PLAN Non statutory forward planning
0200 Initial Notice Initial Notice 20 INITIAL S54(1) Advance notice of Major
0300 Confirmation Notice Confirmation Notice 30 CONFIRM S55(1) Notice of starting date of
0400 Actual Start Date Actual Start Date 40 START S74 / S74A Actual Start Date
0500 Revised Duration Estim Revised Duration Estim 50 REV_DUR S74(3) and (4) Revised duration
0600 Works Stop Works Stop 60 STOP S74(5C) / S74A Works Clear
0700 Partial Registration Registration of Reinsta 70 PARTIAL_REG S70(3) / S70(4A) Completion of
0701 Full Registration Registration of Reinsta 80 FULL_REG S70(3) / S70(4A) Completion of
0800 Bar Hole Registration Registration of Bar Hol 90 BARHOLE S70(3) / S70(4A) Completion of
0900 Cancellation Cancellation 100 CANCEL
1000 Revert Actual Start Works Status Correcti 110 REVERT_START
1001 Revert Work Stop Works Status Correcti 120 REVERT_STOP
1100 Error Correction Error Correction 130 CORRECT Non statutory error correction n
1200 Duration Challenge Duration Challenge 140 CHALLENGE S74(3) and (4) Duration estimate
1300 Duration Challenge Nor Duration Challenge Nor 150 NON_ACCEPT S74 Duration estimate challenge
1400 Informal Overrun Warn Informal Overrun Warr 160 OVERRUN Non statutory informal overrun

Figure 124 - Notice Types

Notice Type ***Display Only*** ***List***

The notice type code will be displayed.

Type Description ***Display Only***

The notice type description of the code will be displayed.

Notice Group ***Display Only***

The notice group to which the notice type belongs to will be displayed.

Sent By Auth ***Display Only/Checkbox***

The checkbox will be ticked if the notice type can be sent by a street authority.

Sent By Prom ***Display Only/Checkbox***

The checkbox will be ticked if the notice type can be sent by a promoter.

Primary Recipient Auth ***Display Only/Checkbox***

The checkbox will be ticked if the primary recipient of the notice type is a street authority.

Primary Recipient Prom ***Display Only/Checkbox***

The checkbox will be ticked if the primary recipient of the notice type is a promoter.

Copy Recipient Auth ***Display Only/Checkbox***

The checkbox will be ticked if the copy recipient of the notice type is a street authority.

Copy Recipient Prom ***Display Only/Checkbox***

The checkbox will be ticked if the copy recipient of the notice type is a promoter.

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Amend Primary Recipient ***Display Only/Checkbox***

The checkbox will be ticked if the primary recipient of the notice type can be amended.

Amend Copy Recipient ***Display Only/Checkbox***

The checkbox will be ticked if the copy recipient of the notice type can be amended.

Seq ***Display Only***

The sequence number of the notice type will be displayed.

Short Name ***Display Only***

The short name of the notice type will be displayed.

Section Of Act ***Display Only***

The section of the act that the notice type applies to will be displayed.

9.2.3 Valid Works Categories

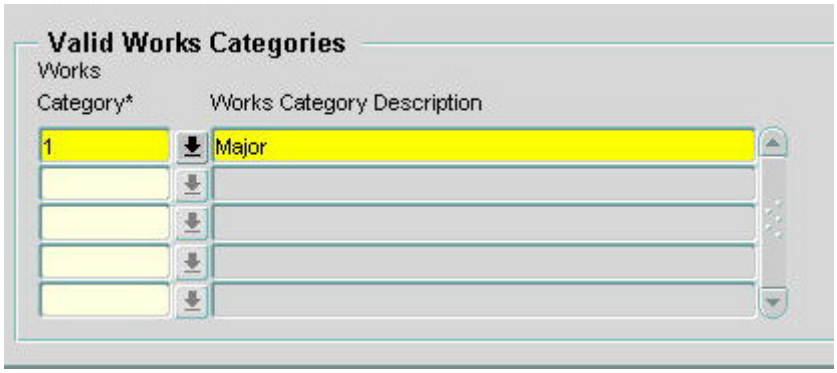

Figure 125 – Works Categories

Works Category ***Display Only*** ***List***

The allowable works categories that apply to the notice type highlighted in the 'Notice Type' part of the form will be displayed.

Works Category Description Display Only

A description of the works categories will be displayed.

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9.3 Valid Notice Recipients – TMA2015

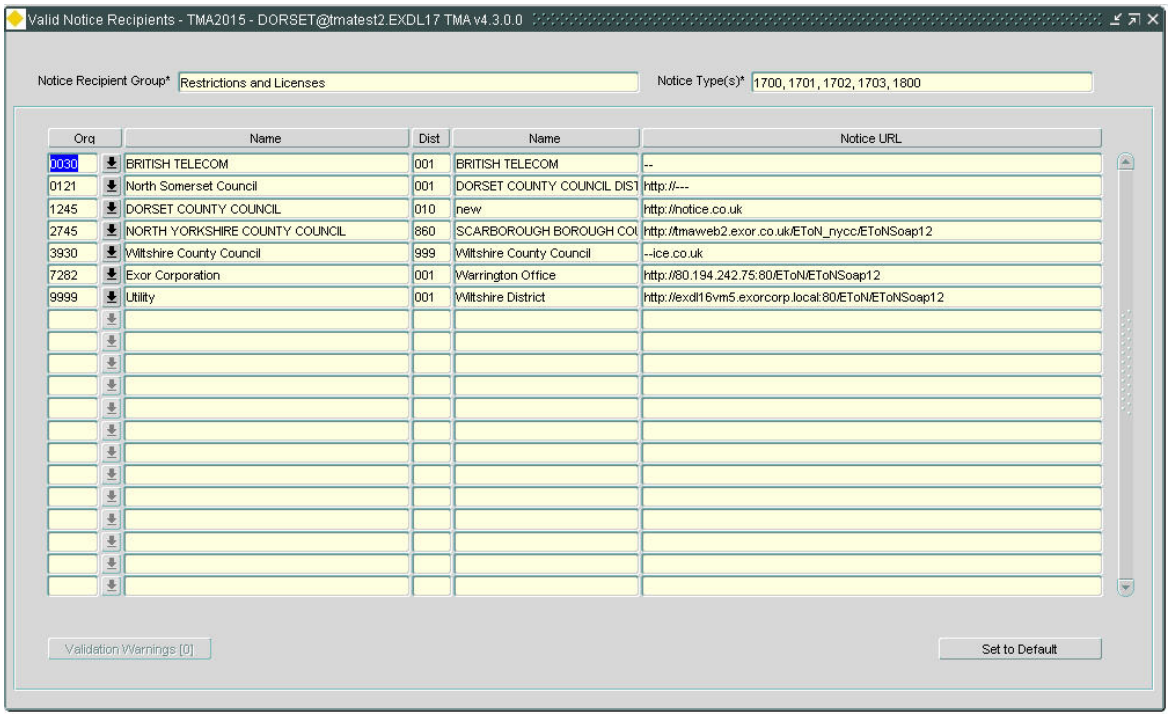
Valid Notice Recipients - TMA2015 - DORSET@tmatest2.EXDL17 TMA v4.3.0.0
Notice Recipient Group* Restrictions and Licenses
Notice Type(s)* 1700, 1701, 1702, 1703, 1800
Org
Name
Dist
Name
Notice URL
0030 BRITISH TELECOM 001 BRITISH TELECOM --
0121 North Somerset Council 001 DORSET COUNTY COUNCIL DIST http://---
1245 DORSET COUNTY COUNCIL 010 new http://notice.co.uk
2745 NORTH YORKSHIRE COUNTY COUNCIL 860 SCARBOROUGH BOROUGH COU http://tmaweb2.exor.co.uk/EToN_nycc/EToNSoap12
3930 Wiltshire County Council 999 Wiltshire County Council --ice.co.uk
7282 Exor Corporation 001 Warrington Office http://80.194.242.75:80/EToN/EToNSoap12
9999 Utility 001 Wiltshire District http://exdl16vm5.exorcorp.local:80/EToN/EToNSoap12
Validation Warnings [0]
Set to Default

Figure 126 - Valid Notice Recipients

9.3.1 General Information

This form allows the user to define specific recipients for Restriction notices.
On implementation this form will be blank. In order to send Restriction notices the recipients MUST be defined.
Recipients can be defined individually using the 'Organisation' list of values.
Recipients can be defined by using the [Set to Default] button to auto-populate the list.

9.3.2 Notice Recipients

Figure 127 - Notice Recipients

Notice Recipient Group ***Display Only***

This field will display 'Restrictions and Licenses'.

Notice Type(s) ***Display Only***

This field will display the notice types relating to restrictions.

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9.3.3 Recipient Details

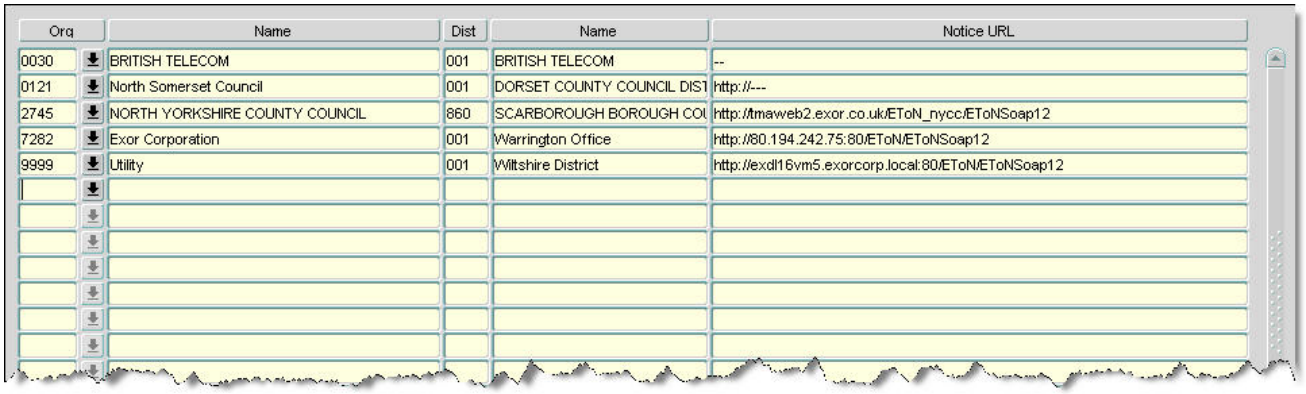
Org
Name
Dist
Name
Notice URL
0030 BRITISH TELECOM 001 BRITISH TELECOM --
0121 North Somerset Council 001 DORSET COUNTY COUNCIL DIST http://---
2745 NORTH YORKSHIRE COUNTY COUNCIL 860 SCARBOROUGH BOROUGH COU http://tmaweb2.exor.co.uk/EToN_nycc/EToNSoap12
7282 Exor Corporation 001 Warrington Office http://80.194.242.75:80/EToN/EToNSoap12
9999 Utility 001 Wiltshire District http://exdl16vm5.exorcorp.local:80/EToN/EToNSoap12

Figure 128 Recipients Details

This part of the form is used to define the recipients of the notices shown in the 'Notice Type(s) field.

Org ***Mandatory*** ***List***

Enter the organisation that is to receive the restriction notices.

Name ***Display Only***

The name of the organisation that is to receive the restriction notices will be displayed.

District ***Mandatory*** ***List***

Enter the district of the organisation that is to receive the restriction notices.

Name ***Display Only***

The name of the district of the organisation that is to receive the restriction notices will be displayed.

Notice URL ***Display Only***

The notice URL of the organisation/district that is to receive the restriction notices will be displayed.

Figure 129 - [Set to Default]

This button is used to auto-populate a default list of recipients based on the following rules:

For each unique Notice URL of Organisation/District the first Organisation/District is chosen (in Organisation/District order).

The current users default Organisation/District is excluded.

Any Organisation/District with the same URL as the default Organisation/District is excluded.

The list can then be amended to suit requirements. One or more recipients can be removed and additional recipients can be added.

Note: By pressing the [**Set to Default**] button any existing defined recipients will be removed and replaced by the default set.

If recipients already exist in the form an alert will be displayed.

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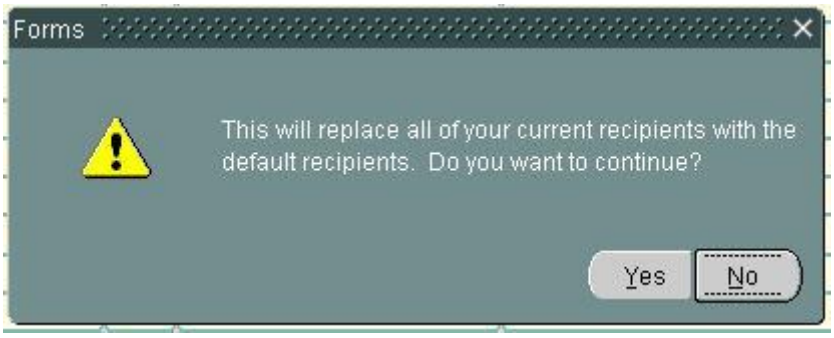

Figure 130 - Alert

Figure 131 - [Validation Warnings (2)]

As recipients are added to the list the system will validate the data. If there are any validation issues the [**Validation Warnings**] button will be active.

Select the button to call a 'Warnings' window where the validation warnings can be viewed.

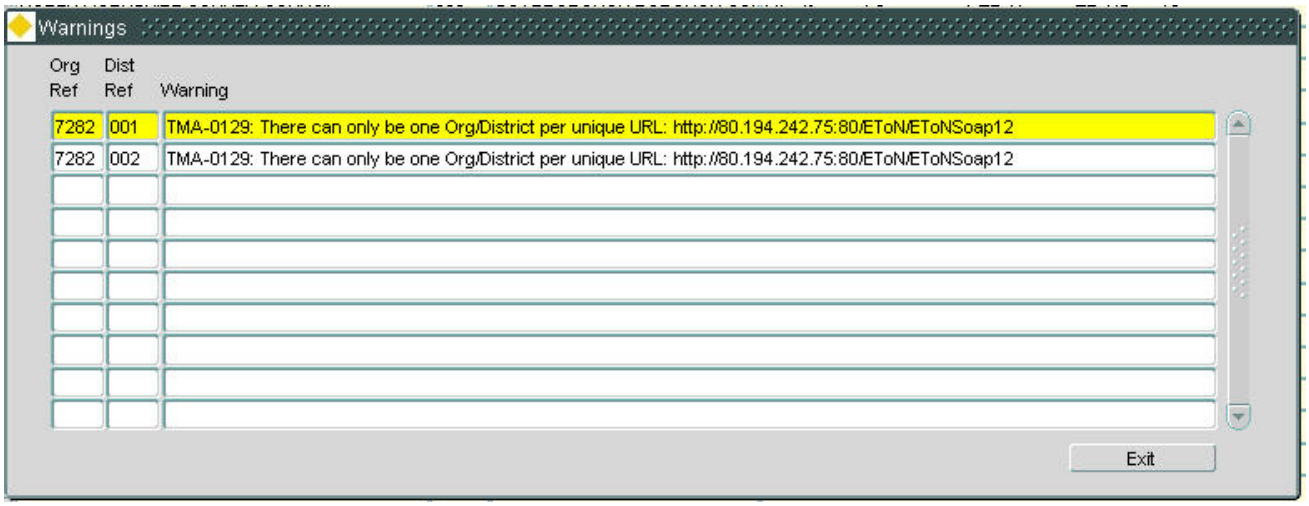
Warnings
Org Ref
Dist Ref
Warning
7282 001 TMA-0129: There can only be one Org/District per unique URL: http://80.194.242.75:80/EToN/EToNSoap12
7282 002 TMA-0129: There can only be one Org/District per unique URL: http://80.194.242.75:80/EToN/EToNSoap12
Exit

Figure 132 -Warnings

Select [Exit] to close the warning window and return to the main form.

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9.4 Work Categories – TMA2020

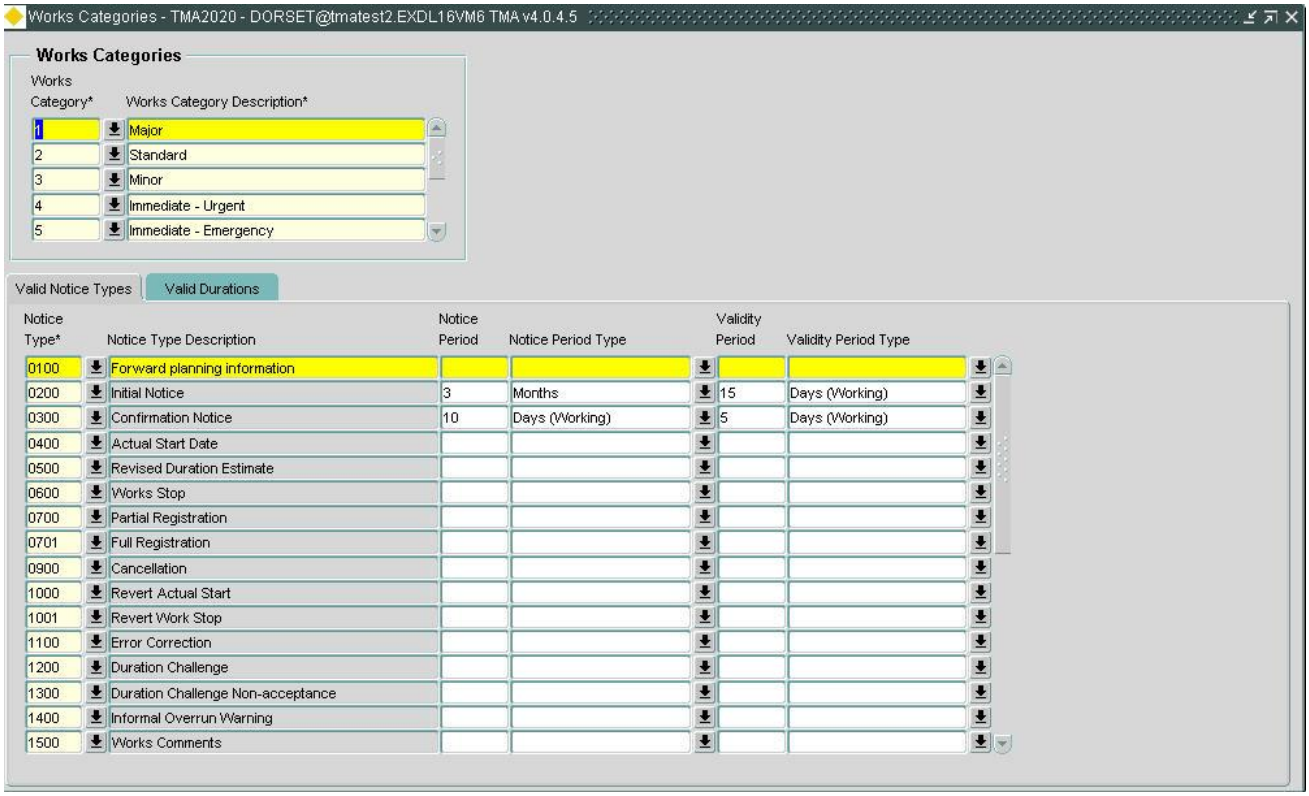

Figure 133 - Work Categories

9.4.1 General Information

This form details all work categories that are available for use in the creation of a notice.
The *Notice Period* details the minimum time, in days, allowable for the notice type.

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9.4.2 Works Categories

Figure 134 - Work Categories

Works Category ***Display Only*** ***List***

The works categories will be displayed.

Works Category Description Display Only

A description of the works categories will be displayed.

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9.4.3 Valid Notice Types tab

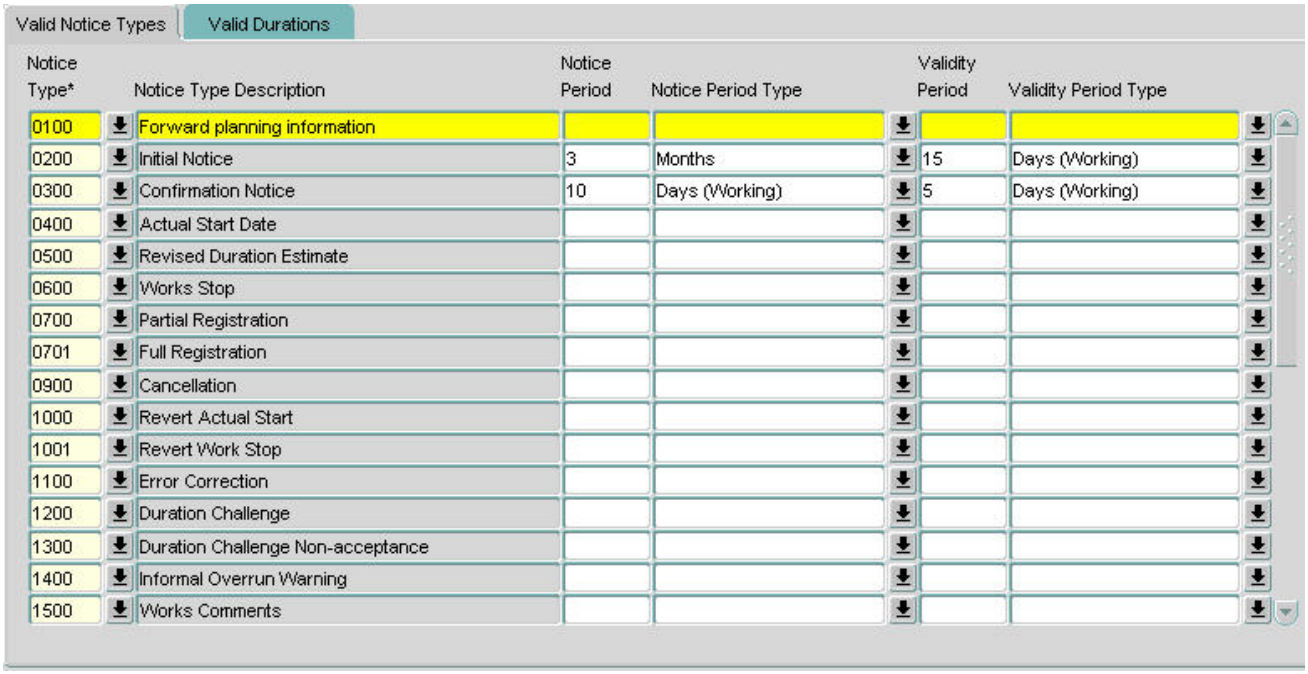

Figure 135 – Valid Notice Types

Notice Type ***Display Only*** ***List***

The notice type code that can be used with the works category highlighted in the 'Works Category' part of the form will be displayed.

Notice Type Description ***Display Only***

The notice type description of the notice type code will be displayed.

Notice Period

The notice period required for the notice type will be displayed.

Notice Period Type ***List***

The notice period type will be displayed.

Validity Period

The validity period for the notice type will be displayed.

Validity Period Type ***List***

The validity period type will be displayed.

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9.4.4 Valid Durations

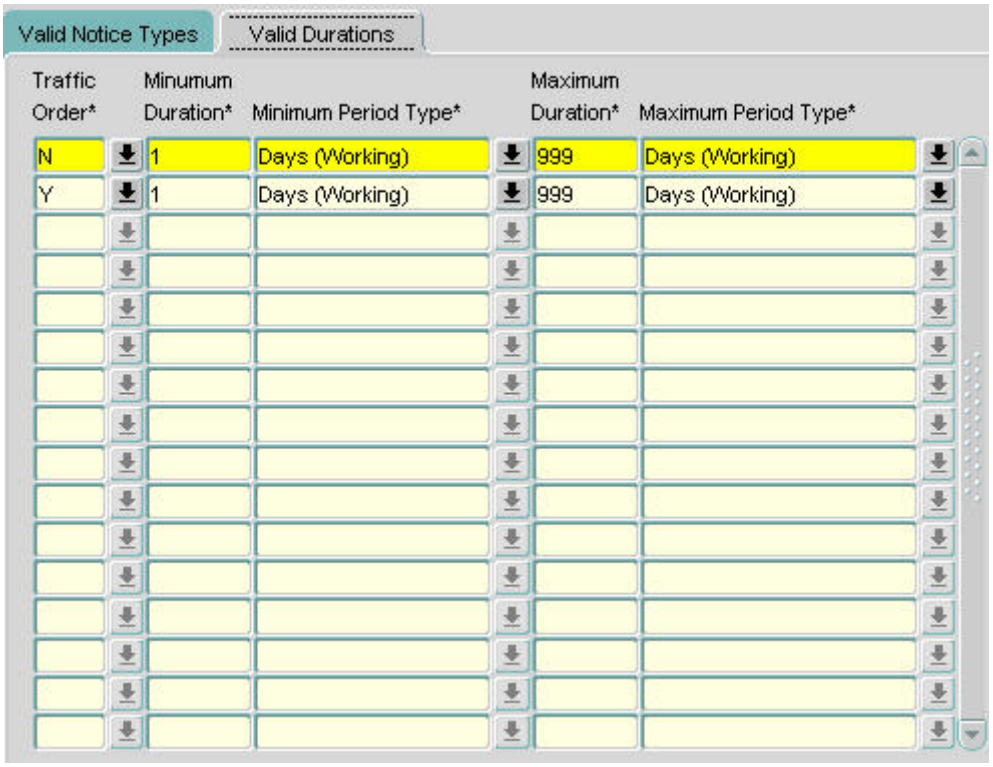

Figure 136 - Valid Durations

Traffic Order ***Display Only***

This field will indicate whether the valid duration for the work category refers to a traffic order.

Minimum Duration ***Display Only***

The minimum duration number for the work category will be displayed.

Minimum Period Type ***Display Only***

The minimum period type for the work category will be displayed.

Maximum Duration ***Display Only***

The maximum duration number for the work category will be displayed.

Maximum Period Type ***Display Only***

The maximum period type for the work category will be displayed.

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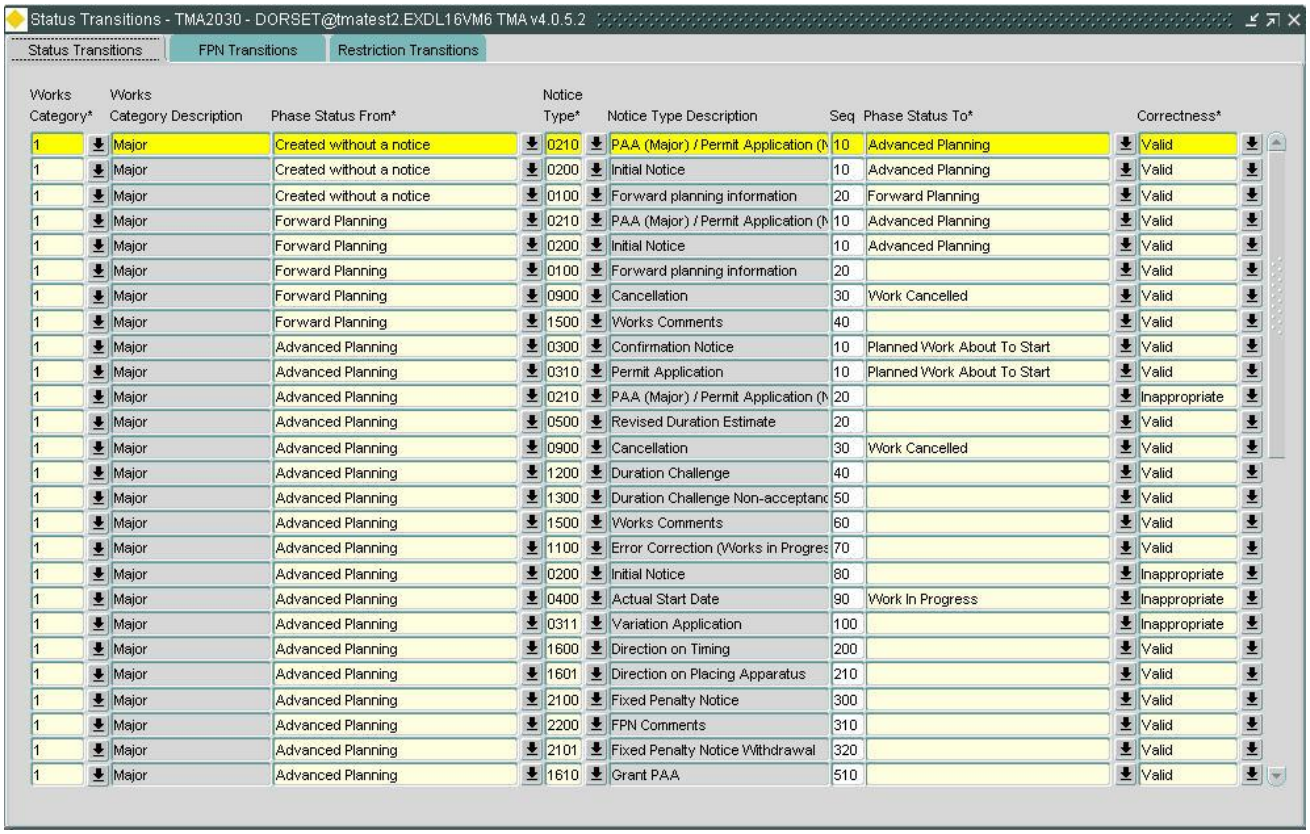
9.5 Status Transitions – TMA2030



Works Category*	Works Category Description	Phase Status From*	Notice Type*	Notice Type Description	Seq	Phase Status To*	Correctness*
1	Major	Created without a notice	0210	PAA (Major) / Permit Application (M	10	Advanced Planning	Valid
1	Major	Created without a notice	0200	Initial Notice	10	Advanced Planning	Valid
1	Major	Created without a notice	0100	Forward planning information	20	Forward Planning	Valid
1	Major	Forward Planning	0210	PAA (Major) / Permit Application (M	10	Advanced Planning	Valid
1	Major	Forward Planning	0200	Initial Notice	10	Advanced Planning	Valid
1	Major	Forward Planning	0100	Forward planning information	20		Valid
1	Major	Forward Planning	0900	Cancellation	30	Work Cancelled	Valid
1	Major	Forward Planning	1500	Works Comments	40		Valid
1	Major	Advanced Planning	0300	Confirmation Notice	10	Planned Work About To Start	Valid
1	Major	Advanced Planning	0310	Permit Application	10	Planned Work About To Start	Valid
1	Major	Advanced Planning	0210	PAA (Major) / Permit Application (M	20		Inappropriate
1	Major	Advanced Planning	0500	Revised Duration Estimate	20		Valid
1	Major	Advanced Planning	0900	Cancellation	30	Work Cancelled	Valid
1	Major	Advanced Planning	1200	Duration Challenge	40		Valid
1	Major	Advanced Planning	1300	Duration Challenge Non-acceptanc	50		Valid
1	Major	Advanced Planning	1500	Works Comments	60		Valid
1	Major	Advanced Planning	1100	Error Correction (Works in Progres	70		Valid
1	Major	Advanced Planning	0200	Initial Notice	80		Inappropriate
1	Major	Advanced Planning	0400	Actual Start Date	90	Work In Progress	Inappropriate
1	Major	Advanced Planning	0311	Variation Application	100		Inappropriate
1	Major	Advanced Planning	1600	Direction on Timing	200		Valid
1	Major	Advanced Planning	1601	Direction on Placing Apparatus	210		Valid
1	Major	Advanced Planning	2100	Fixed Penalty Notice	300		Valid
1	Major	Advanced Planning	2200	FPN Comments	310		Valid
1	Major	Advanced Planning	2101	Fixed Penalty Notice Withdrawal	320		Valid
1	Major	Advanced Planning	1610	Grant PAA	510		Valid

Figure 137 – Status Transitions

9.5.1 General Information

The main screen of this form identifies work transition rules that are valid for different stages of a phase of a works. There are two additional tabs that define FPN Transitions and Restriction Transactions.

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9.5.2 Status Transitions

Works Category ***Display Only*** ***List***

The works categories will be displayed.

Works Category Description Display Only

A description of the works categories will be displayed.

Phase Status From ***Display Only*** ***List***

The phase status from which the notice type is to be issued will be displayed.

Notice Type ***Display Only*** ***List***

The notice type code that can be used with the works category will be displayed.

Notice Type Description ***Display Only***

The notice type description of the notice type code will be displayed.

Seq ***Display Only***

The sequence of the notice that can be used with the works category will be displayed.

Phase Status To ***Display Only*** ***List***

The phase status to which the notice type will take the work category will be displayed.

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9.5.3 FPN Transitions

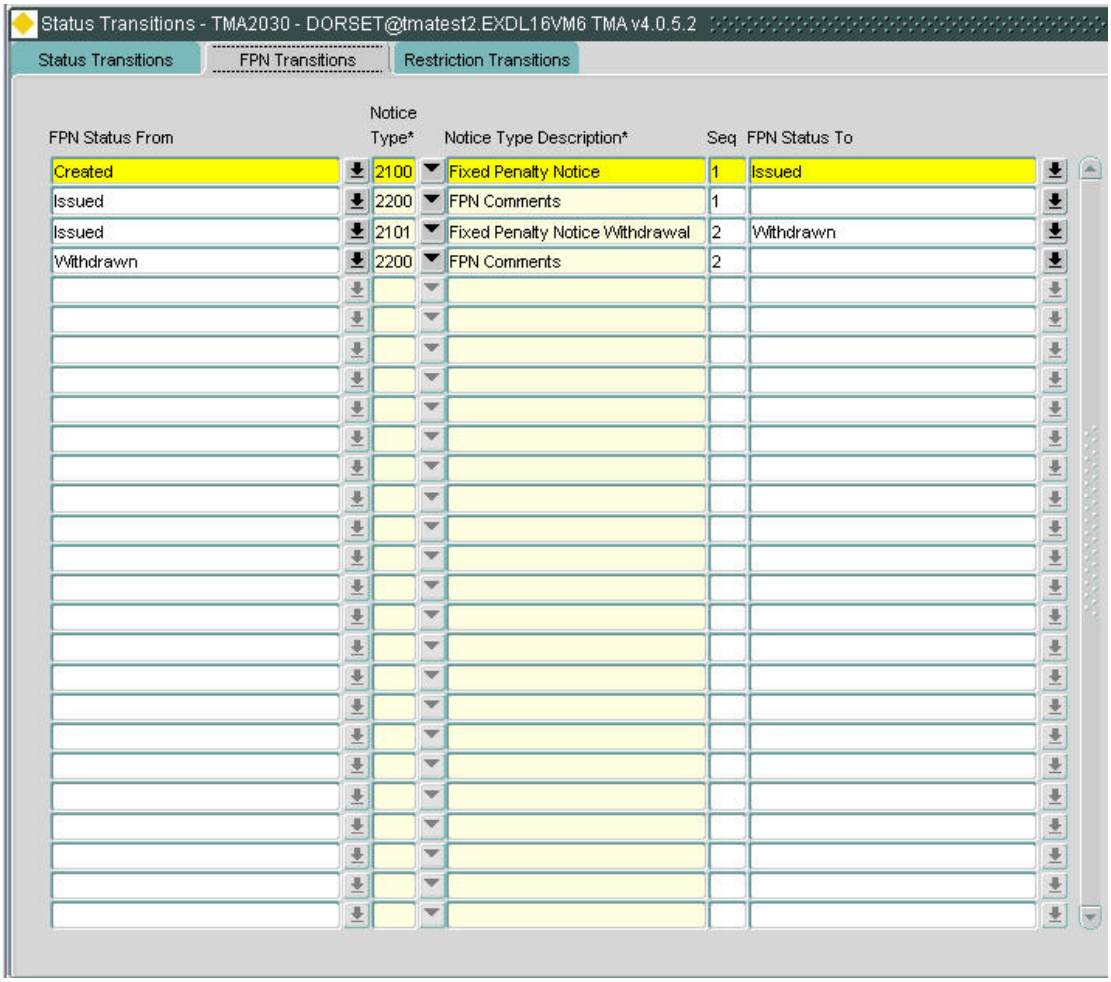

Figure 138 – FPN Transitions

FPN Status From ***Display Only*** ***List***

The FPN status from which the FPN notice type is to be issued will be displayed.

Notice Type ***Display Only*** ***List***

The notice type code that can be used at the FPN status will be displayed.

Notice Type Description ***Display Only***

The notice type description of the notice type code will be displayed.

Seq ***Display Only***

The sequence of the notice that can be used with the FPN status will be displayed.

FPN Status To ***Display Only*** ***List***

The FPN status to which the notice type will take the FPN notice will be displayed.

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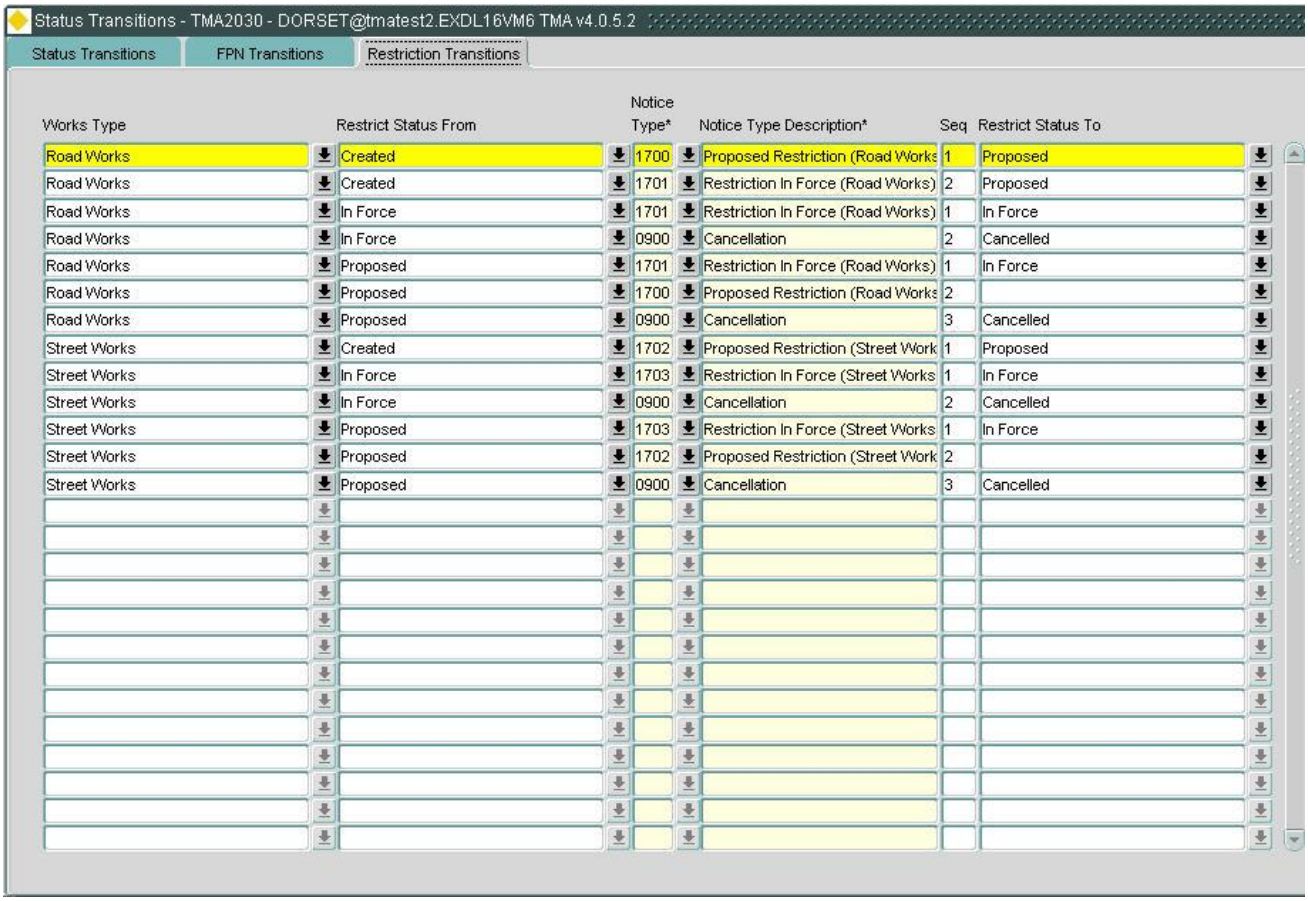
9.5.4 Restriction Transitions



Works Type	Restrict Status From	Notice Type*	Notice Type Description*	Seq	Restrict Status To
Road Works	Created	1700	Proposed Restriction (Road Works	1	Proposed
Road Works	Created	1701	Restriction In Force (Road Works)	2	Proposed
Road Works	In Force	1701	Restriction In Force (Road Works)	1	In Force
Road Works	In Force	0900	Cancellation	2	Cancelled
Road Works	Proposed	1701	Restriction In Force (Road Works)	1	In Force
Road Works	Proposed	1700	Proposed Restriction (Road Works	2	
Road Works	Proposed	0900	Cancellation	3	Cancelled
Street Works	Created	1702	Proposed Restriction (Street Work	1	Proposed
Street Works	In Force	1703	Restriction In Force (Street Works	1	In Force
Street Works	In Force	0900	Cancellation	2	Cancelled
Street Works	Proposed	1703	Restriction In Force (Street Works	1	In Force
Street Works	Proposed	1702	Proposed Restriction (Street Work	2	
Street Works	Proposed	0900	Cancellation	3	Cancelled

Figure 139 – Restriction Transitions

Works Type ***Display Only*** ***List***

The works type will be displayed.

Restrict Status From ***Display Only*** ***List***

The restrict status from which the restriction notice type is to be issued will be displayed.

Notice Type ***Display Only*** ***List***

The notice type code that can be used with the works type will be displayed.

Notice Type Description ***Display Only***

The notice type description of the notice type code will be displayed.

Seq ***Display Only***

The sequence of the restriction notice that can be used with the works type will be displayed.

Restrict Status To ***Display Only*** ***List***

The restrict status to which the notice type will take the work type will be displayed.

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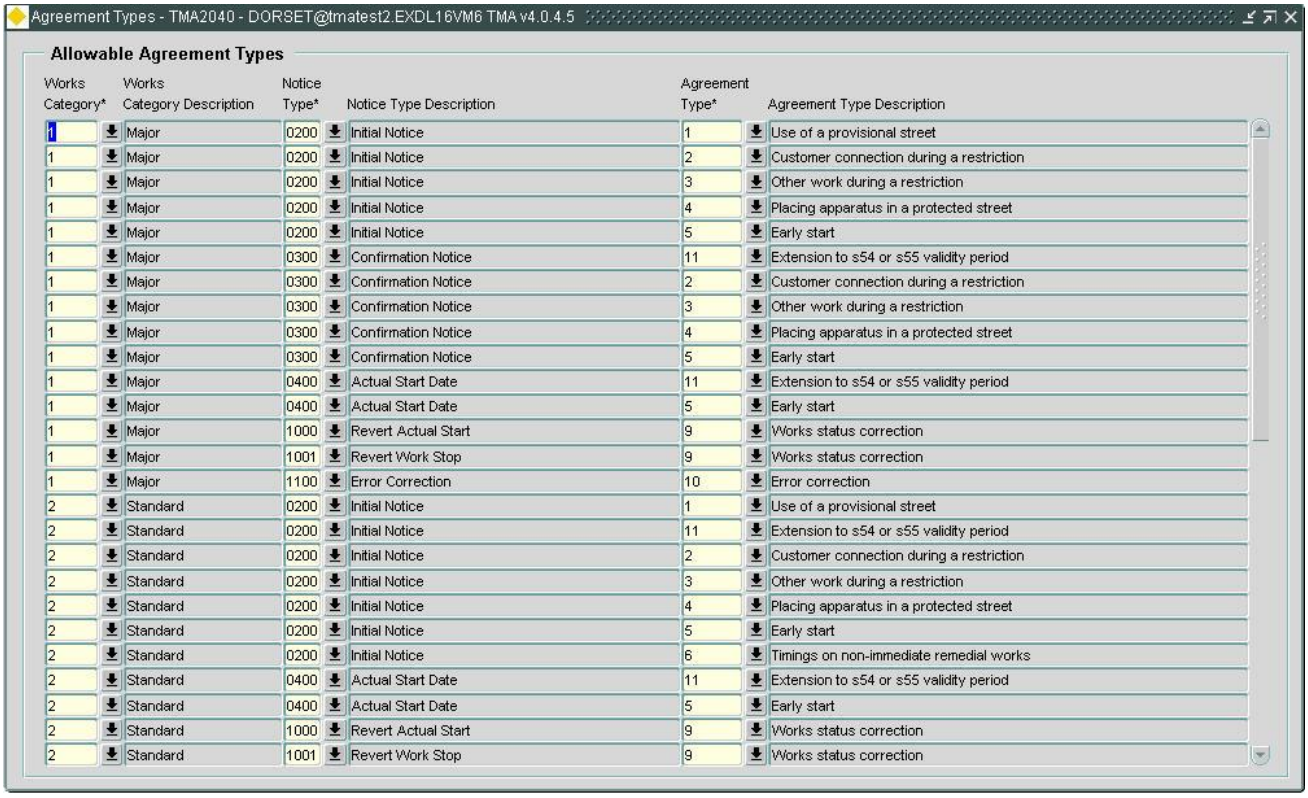
9.6 Agreement Types – TMA2040



Works Category*	Works Category Description	Notice Type*	Notice Type Description	Agreement Type*	Agreement Type Description
1	Major	0200	Initial Notice	1	Use of a provisional street
1	Major	0200	Initial Notice	2	Customer connection during a restriction
1	Major	0200	Initial Notice	3	Other work during a restriction
1	Major	0200	Initial Notice	4	Placing apparatus in a protected street
1	Major	0200	Initial Notice	5	Early start
1	Major	0300	Confirmation Notice	11	Extension to s54 or s55 validity period
1	Major	0300	Confirmation Notice	2	Customer connection during a restriction
1	Major	0300	Confirmation Notice	3	Other work during a restriction
1	Major	0300	Confirmation Notice	4	Placing apparatus in a protected street
1	Major	0300	Confirmation Notice	5	Early start
1	Major	0400	Actual Start Date	11	Extension to s54 or s55 validity period
1	Major	0400	Actual Start Date	5	Early start
1	Major	1000	Revert Actual Start	9	Works status correction
1	Major	1001	Revert Work Stop	9	Works status correction
1	Major	1100	Error Correction	10	Error correction
2	Standard	0200	Initial Notice	1	Use of a provisional street
2	Standard	0200	Initial Notice	11	Extension to s54 or s55 validity period
2	Standard	0200	Initial Notice	2	Customer connection during a restriction
2	Standard	0200	Initial Notice	3	Other work during a restriction
2	Standard	0200	Initial Notice	4	Placing apparatus in a protected street
2	Standard	0200	Initial Notice	5	Early start
2	Standard	0200	Initial Notice	6	Timings on non-immediate remedial works
2	Standard	0400	Actual Start Date	11	Extension to s54 or s55 validity period
2	Standard	0400	Actual Start Date	5	Early start
2	Standard	1000	Revert Actual Start	9	Works status correction
2	Standard	1001	Revert Work Stop	9	Works status correction

Figure 140 - Agreement Types

9.6.1 General Information

This form identifies which agreement types are applicable to which notice type.

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9.6.2 Allowable Agreement Types

Works Category ***Display Only*** ***List***

The works categories will be displayed.

Works Category Description Display Only

A description of the works categories will be displayed.

Notice Type ***Display Only*** ***List***

The notice type code that can be used with the works category will be displayed.

Notice Type Description ***Display Only***

The notice type description of the notice type code will be displayed.

Agreement Type ***Display Only*** ***List***

The agreement type that can be used with the works category/notice type combination will be displayed.
Agreement types will have been defined in form *Domains – HIG9120* under the option *AGREEMENT_TYPE*.

Agreement Type Description Display Only

A description of the agreement type will be displayed.

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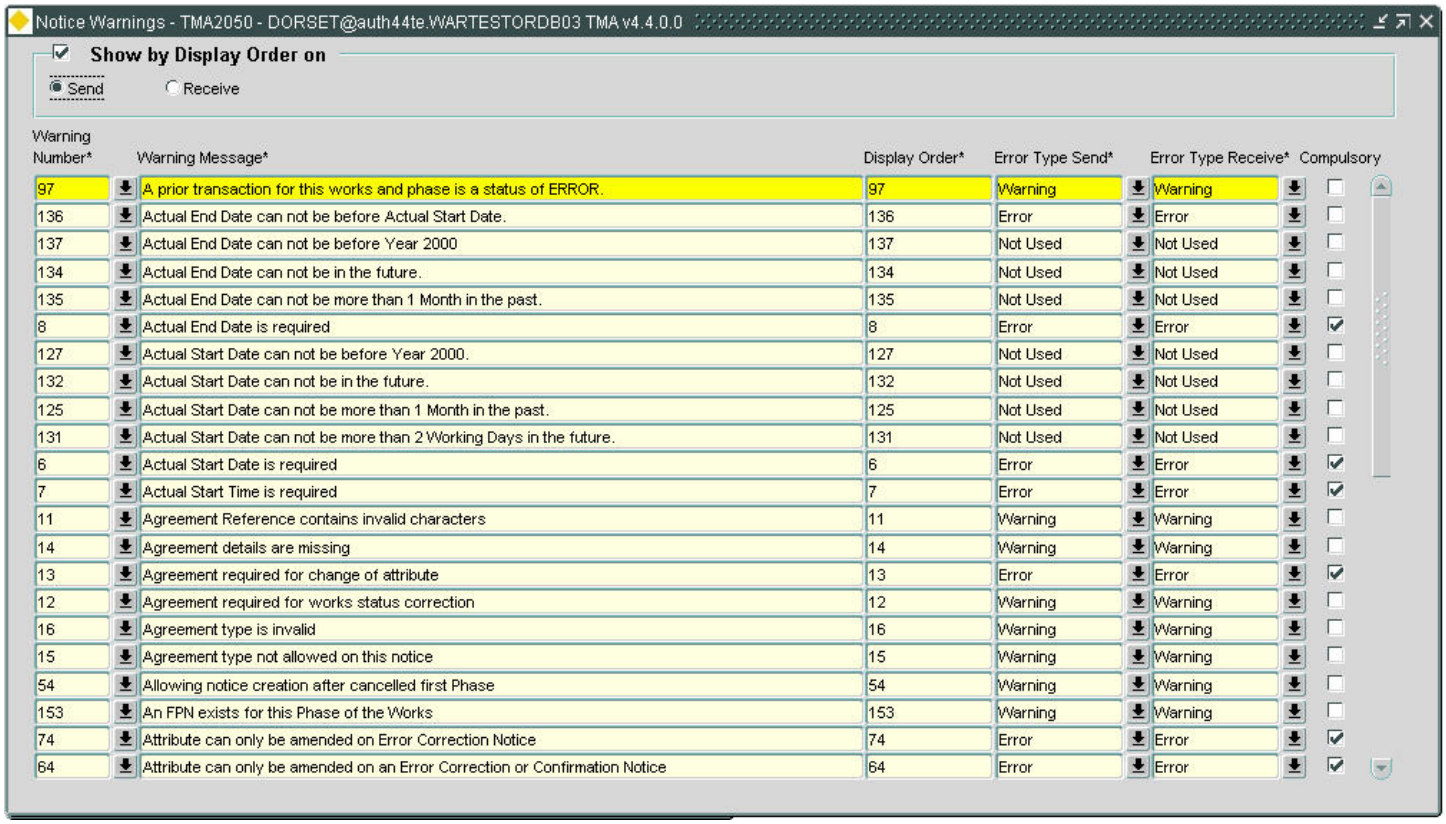
9.7 Notice Warnings – TMA2050



Warning Number*	Warning Message*	Display Order*	Error Type Send*	Error Type Receive*	Compulsory
97	A prior transaction for this works and phase is a status of ERROR.	97	Warning	Warning	☐
136	Actual End Date can not be before Actual Start Date.	136	Error	Error	☐
137	Actual End Date can not be before Year 2000	137	Not Used	Not Used	☐
134	Actual End Date can not be in the future.	134	Not Used	Not Used	☐
135	Actual End Date can not be more than 1 Month in the past.	135	Not Used	Not Used	☐
8	Actual End Date is required	8	Error	Error	☑
127	Actual Start Date can not be before Year 2000.	127	Not Used	Not Used	☐
132	Actual Start Date can not be in the future.	132	Not Used	Not Used	☐
125	Actual Start Date can not be more than 1 Month in the past.	125	Not Used	Not Used	☐
131	Actual Start Date can not be more than 2 Working Days in the future.	131	Not Used	Not Used	☐
6	Actual Start Date is required	6	Error	Error	☑
7	Actual Start Time is required	7	Error	Error	☑
11	Agreement Reference contains invalid characters	11	Warning	Warning	☐
14	Agreement details are missing	14	Warning	Warning	☐
13	Agreement required for change of attribute	13	Error	Error	☑
12	Agreement required for works status correction	12	Warning	Warning	☐
16	Agreement type is invalid	16	Warning	Warning	☐
15	Agreement type not allowed on this notice	15	Warning	Warning	☐
54	Allowing notice creation after cancelled first Phase	54	Warning	Warning	☐
153	An FPN exists for this Phase of the Works	153	Warning	Warning	☐
74	Attribute can only be amended on Error Correction Notice	74	Error	Error	☑
64	Attribute can only be amended on an Error Correction or Confirmation Notice	64	Error	Error	☑

Figure 141 - Notice Warnings

9.7.1 General Information

This form details the different error and warning messages that may appear as part of the validation of works and inspections.

The list can be ordered using the ‘Show by Display Order on’ checkbox and selecting either ‘Send’ or ‘Receive’.

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9.7.2 Notice Warnings

Warning Number ***Display Only*** ***List***

The warning number will be displayed.

Warning Message ***Display Only***

A description of the warning message will be displayed.

Display Order ***Display Only*** ***List***

The display order of the warning will be displayed.

Error Type Send ***Display Only*** ***List***

This field will indicate whether the system will show a warning or an error when the notice is sent.
Error types will have been defined in form *Domains – HIG9120* under the option *ERROR_TYPE*.

Error Type Receive ***Display Only*** ***List***

This field will indicate whether the system will show a warning or an error when the notice is received.
Error types will have been defined in form *Domains – HIG9120* under the option *ERROR_TYPE*.

Compulsory ***Checkbox***

The checkbox will be ticked if the error or warning is compulsory.

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9.8 Section 74 Charges Profile – TMA2060

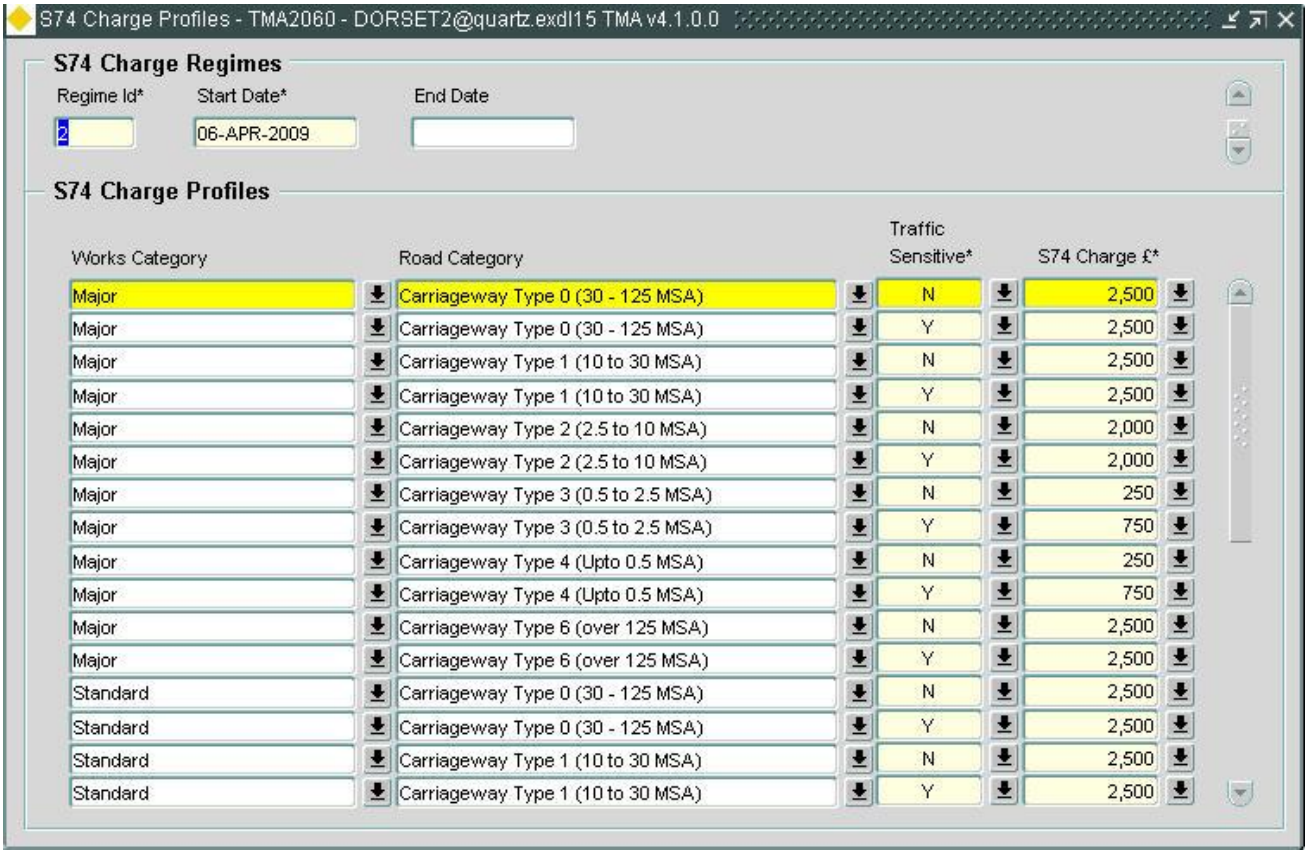
S74 Charge Profiles - TMA2060 - DORSET2@quartz.exdl15 TMA v4.1.0.0
S74 Charge Regimes
Regime Id*
Start Date*
End Date
2
06-APR-2009
S74 Charge Profiles
Works Category
Road Category
Traffic Sensitive*
S74 Charge £*
Major | Carriageway Type 0 (30 - 125 MSA) | N | 2,500
Major | Carriageway Type 0 (30 - 125 MSA) | Y | 2,500
Major | Carriageway Type 1 (10 to 30 MSA) | N | 2,500
Major | Carriageway Type 1 (10 to 30 MSA) | Y | 2,500
Major | Carriageway Type 2 (2.5 to 10 MSA) | N | 2,000
Major | Carriageway Type 2 (2.5 to 10 MSA) | Y | 2,000
Major | Carriageway Type 3 (0.5 to 2.5 MSA) | N | 250
Major | Carriageway Type 3 (0.5 to 2.5 MSA) | Y | 750
Major | Carriageway Type 4 (Upto 0.5 MSA) | N | 250
Major | Carriageway Type 4 (Upto 0.5 MSA) | Y | 750
Major | Carriageway Type 6 (over 125 MSA) | N | 2,500
Major | Carriageway Type 6 (over 125 MSA) | Y | 2,500
Standard | Carriageway Type 0 (30 - 125 MSA) | N | 2,500
Standard | Carriageway Type 0 (30 - 125 MSA) | Y | 2,500
Standard | Carriageway Type 1 (10 to 30 MSA) | N | 2,500
Standard | Carriageway Type 1 (10 to 30 MSA) | Y | 2,500

Figure 142 - Section 74 Charges Profile

9.8.1 General Information

The section 74 Profile page is a view only information page which shows.

The S74 Charges Profile form details the current charges based on the Works Category, Road Category and Traffic Sensitivity and values of section 74 charges that can be raised in accordance with a works overrunning. These rules are configured in the metadata as part of the installation and are not user configurable, as they adhere to the TMA legislation. In order to amend the value a new rule set must be imported and the current rule set end dated, by populating the end date.

The section 74 charges that can be raised in accordance with a works overrunning vary according to the type of works, the reinstatement category of the carriageway and whether the street is traffic sensitive. If a works with more than one site overruns then the charges will be levied in accordance with the values of the highest reinstatement category on that works.

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9.8.2 S74 Charge Regime

Regime Id ***Display Only***

The Id of the section 74 will be displayed.

Start Date ***Display Only***

The start date of the section 74 regime will be displayed.

End Date ***Display Only***

The end date of the section 74 regime will be displayed.

Works Category ***Display Only***

The works category of the section 74 charge will be displayed.

Road Category ***Display Only***

The road category of the section 74 charge will be displayed.

Traffic Sensitive ***Display Only***

The traffic sensitive of the section 74 regime will be displayed.

S74 Charge £ ***Display Only***

The charge for overrun of works based on the previous fields will be displayed.

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9.9 Spatial Relationships – TMA2065

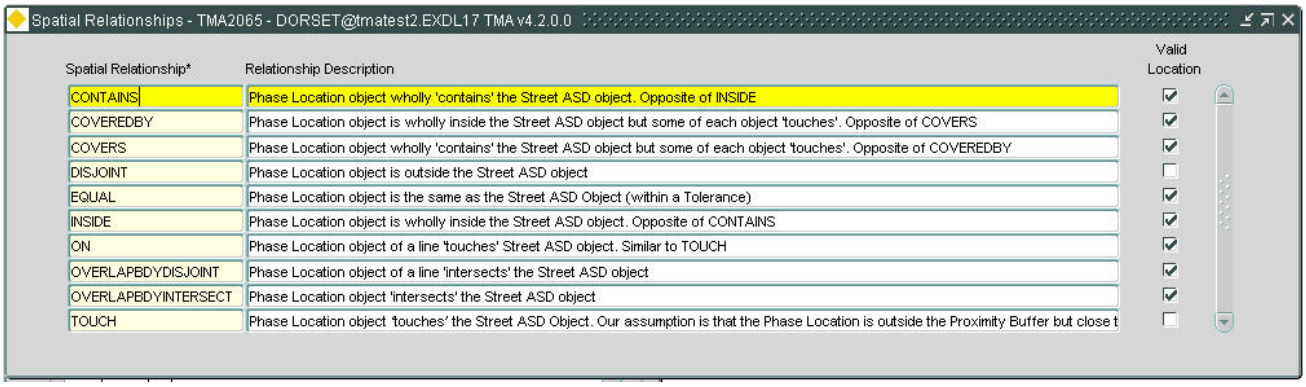
Spatial Relationships - TMA2065 - DORSET@tmatest2.EXDL17 TMA v4.2.0.0
Spatial Relationship*
Relationship Description
Valid Location
CONTAINS
Phase Location object wholly 'contains' the Street ASD object. Opposite of INSIDE
COVEREDBY
Phase Location object is wholly inside the Street ASD object but some of each object 'touches'. Opposite of COVERS
COVERS
Phase Location object wholly 'contains' the Street ASD object but some of each object 'touches'. Opposite of COVEREDBY
DISJOINT
Phase Location object is outside the Street ASD object
EQUAL
Phase Location object is the same as the Street ASD Object (within a Tolerance)
INSIDE
Phase Location object is wholly inside the Street ASD object. Opposite of CONTAINS
ON
Phase Location object of a line 'touches' Street ASD object. Similar to TOUCH
OVERLAPBDYDISJOINT
Phase Location object of a line 'intersects' the Street ASD object
OVERLAPBDYINTERSECT
Phase Location object 'intersects' the Street ASD object
TOUCH
Phase Location object 'touches' the Street ASD Object. Our assumption is that the Phase Location is outside the Proximity Buffer but close t

Figure 143 - Spatial Relationships

9.9.1 General Information

The Spatial Relationships module holds metadata that defines the control of the valid location of a works.

Note: The values must not be changed unless under advisement of Exor support.

A location is deemed as invalid (*i.e.*, not schedulable), if:

- The whole of the location geometry is outside the street (including the TMABUFFPRX buffer).
- Any part of the location geometry 'touches' the street (including the TMABUFFPRX buffer) as this is deemed as being wholly outside the street.

Spatial Relationships ***Display Only***

This field shows valid Oracle Spatial Relationships. These are used to determine whether a location is valid or not.

Relationship Description ***Display Only***

A description of the spatial relationship will be displayed.

Valid Location ***Checkbox***

This checkbox shows which relationships determine whether a location is valid or not when using the Proximity Validation functionality.

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10 Inspections

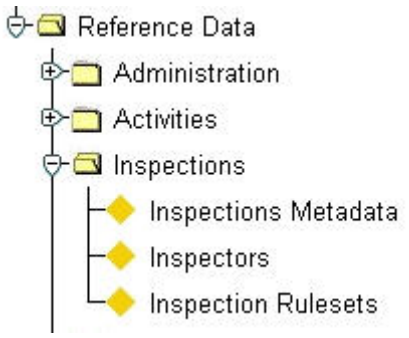

Figure 144 – Inspections Menu

This chapter describes the forms and processes used for setting up inspections in **TMA by Exor**. They are the following forms:

- Inspection Metadata – TMA5200
- Inspectors – TMA5290
- Inspection Rulesets – TMA5300

The form descriptions provide you with detailed information about each TMA Works form in **TMA by Exor**, including:

- an overall description of the form
- a detailed explanation of each field, including available features (such as List of Values), default values and other characteristics
- helpful information for using the form

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10.1 Inspections Metadata – TMA5200

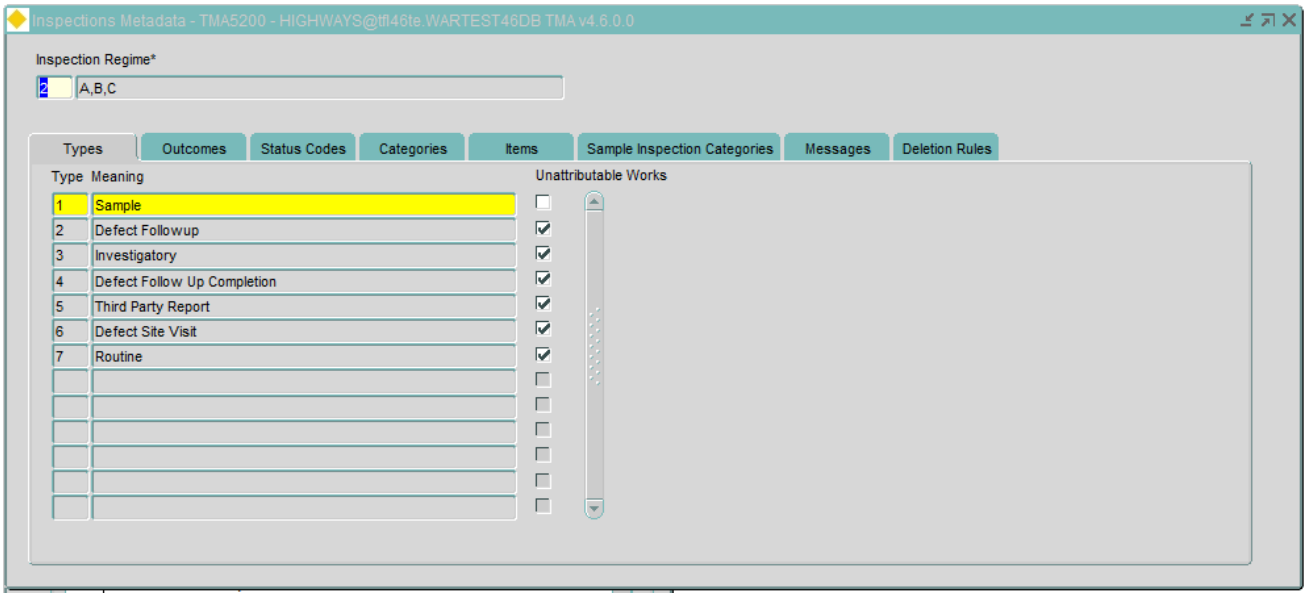

Figure 145 - Inspections Metadata

10.1.1 General Information

The reference data in the *Inspections Metadata* form is created as part of the system installation and uses standard EToN compliant inspection metadata. The Inspection Regime is set to the current the *A B C Inspection Regime* and all metadata is applicable to that regime. The form manages the majority of the metadata used in the inspections process and provides the lookup values in the list of values in form *Inspections – TMA5000*.

Note: Existing metadata MUST NOT be changed in this form.

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10.1.2 Inspection Types

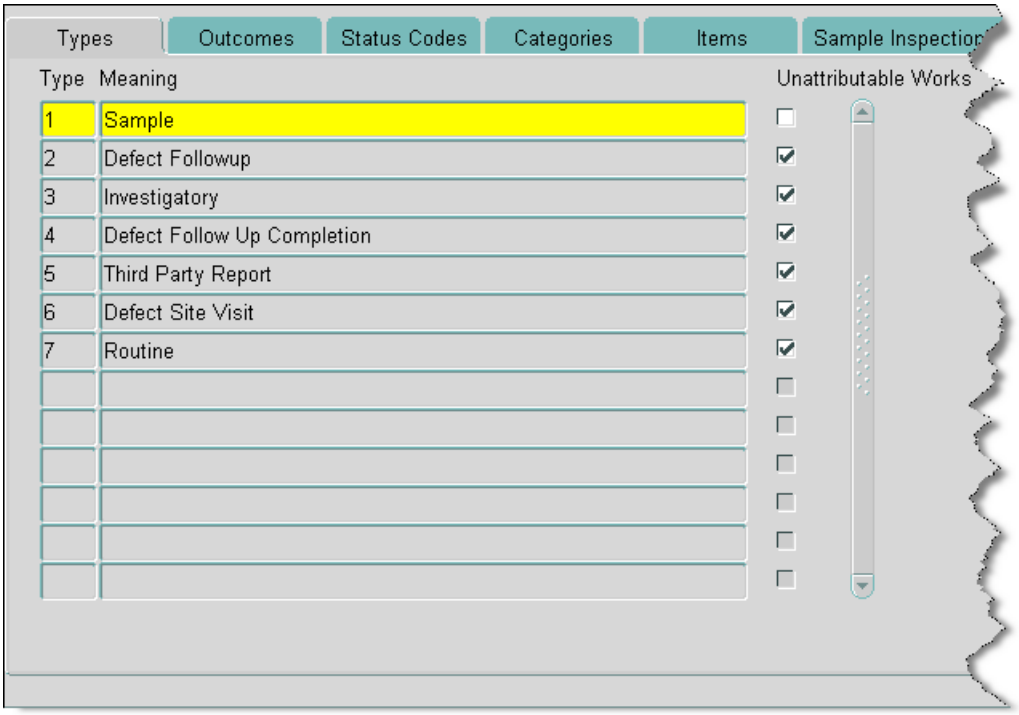

Figure 146 - Types

The inspection types create a list of values to choose from when creating an inspection.

Where the checkbox is selected for *Unattributable Works*, this type of inspection can be used against and unattributable works.

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10.1.3 Inspection Outcomes

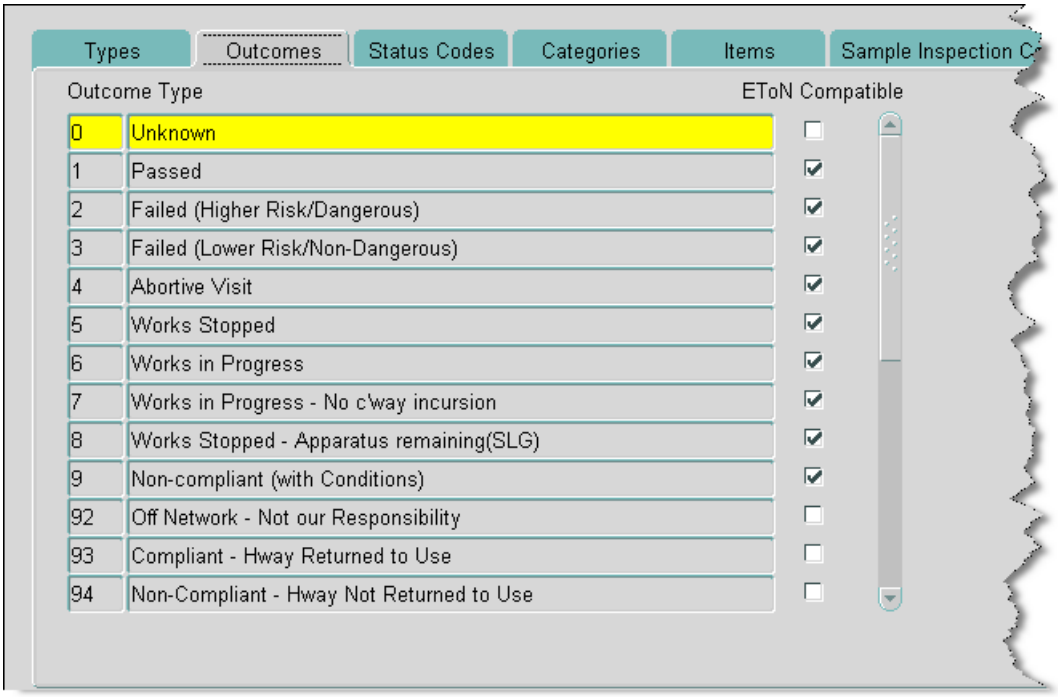

Figure 147 - Outcomes

The values in the matrix list allowable inspection outcomes.

The *EToN complaint* checkbox indicates, when checked, which of the outcome types are complaint with EToN.

These groupings will appear as a list of values in the *Insp Outcome* field in form *Inspection – TMA5000.*

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10.1.4 Inspection Status Codes

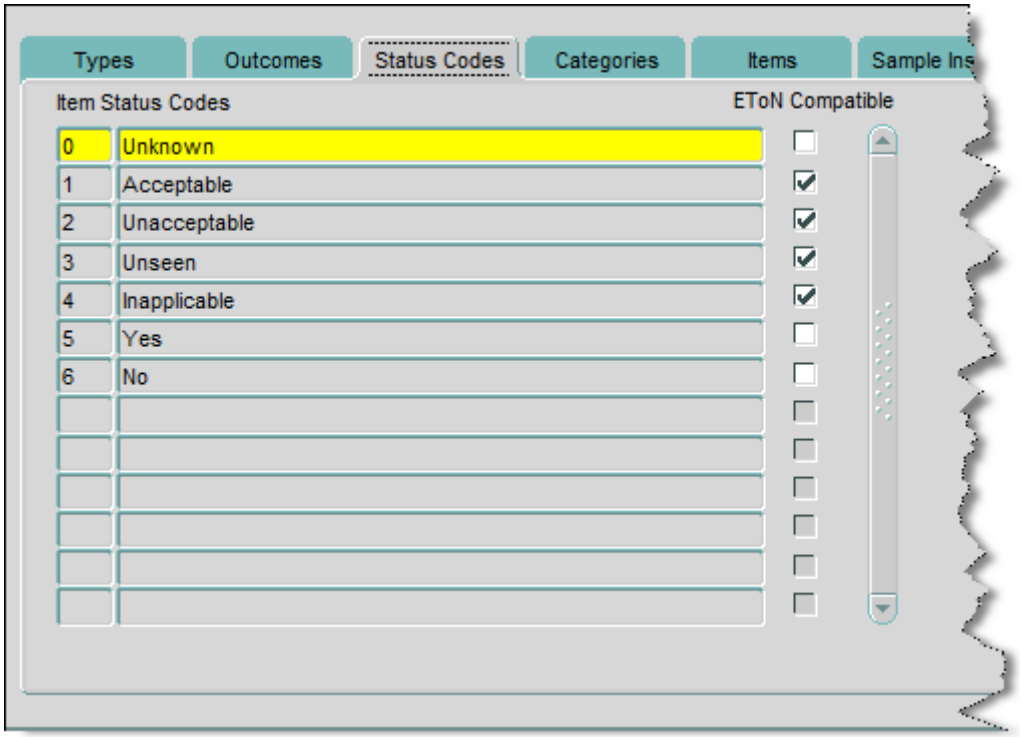

Figure 148 - Status Codes

These status codes are used identify the status of Site Items when completing an inspection.
The *EToN complaint* checkbox indicates, when checked, which of the status codes are complaint with EToN.

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10.1.5 Inspection Categories

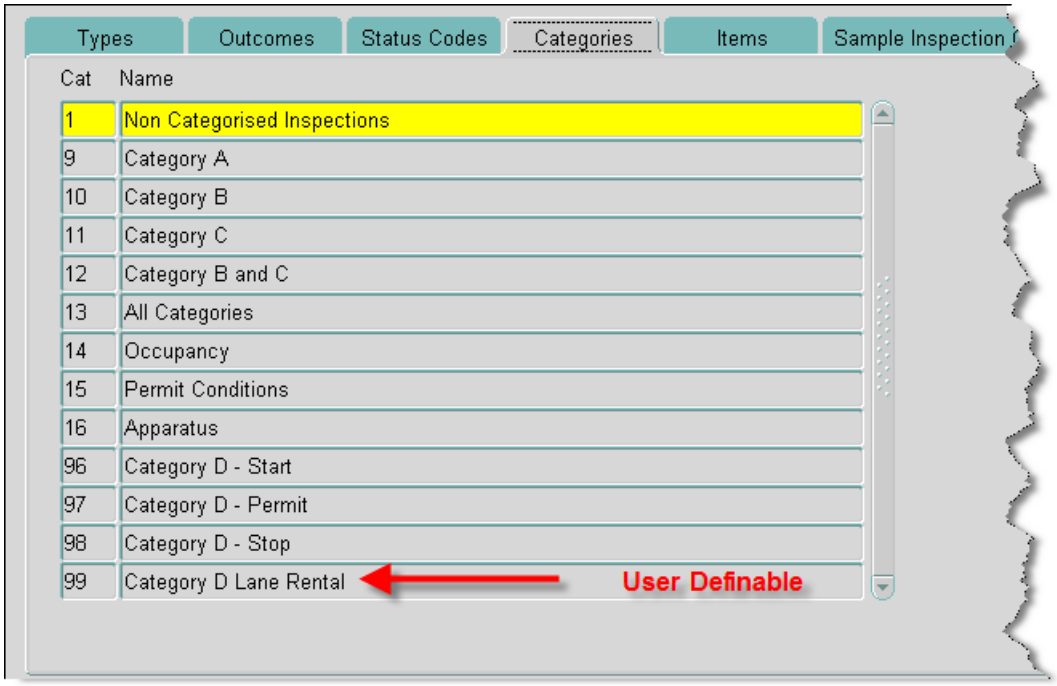

Figure 149 - Categories

The inspection categories create a list of values to choose from when creating or scheduling an inspection.

These groupings will appear as a list of values in the *Insp Category* field in form *Inspections – TMA5000.*

Note: The default value of "Category D – Ad-Hoc", may be updated by the user to one of their choosing, for example 'Lane Rental' or to whatever 'fits the bill'.

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10.1.6 Inspection Items

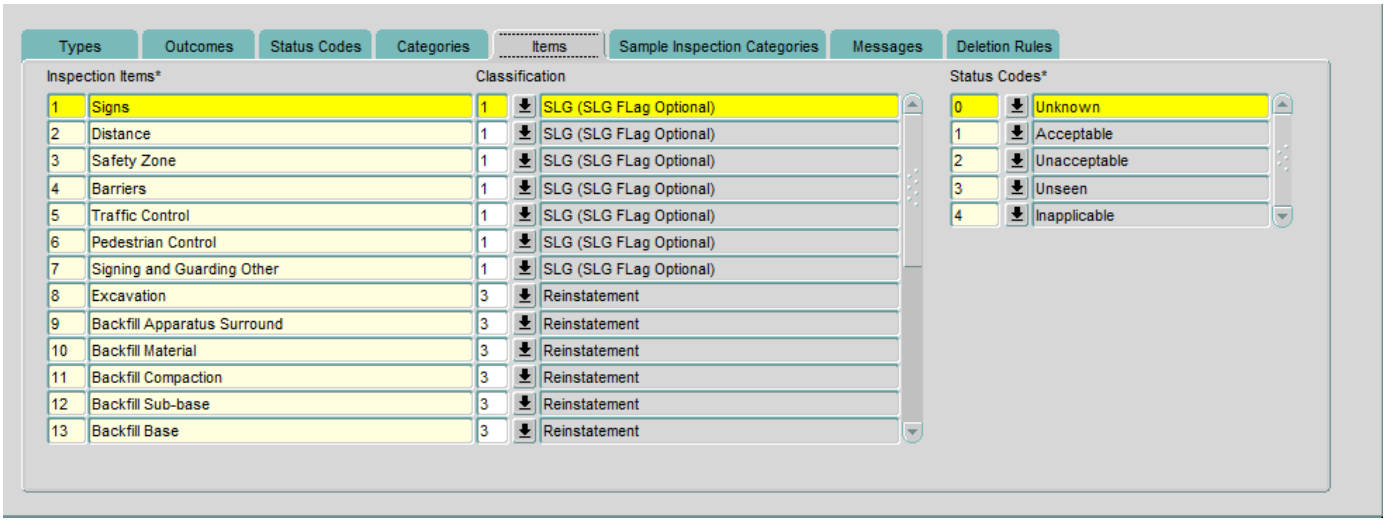

Figure 150 - Items

These classifications are used within the system to determine which inspection items are applicable to the inspection category.

This form can also be used to determine whether the *SLG Improvement Notice* flag in *Inspection* is enabled for each inspected site item.

The user can define additional Inspection items for use against a Category A inspection for the purposes of categorising a works as ‘Exemplary’.

Note: This functionality is licensed at additional cost; for further information please contact your Exor Account Manager.

Note: These additional inspection items will not be transferred to a DCD device at this time.

The exemplary works functionality can be turned on or off by setting **Product Option - IEXEMP**.

Item codes 60 to 99 have been reserved for all user-defined inspection items. New items should not be created outside of this range otherwise the system may become unstable. The inspection item is limited to 40 characters.

Note: New items must have a classification of ‘Exemplary’ otherwise the system will become unstable.

Once created, the new items must then be attributed against Category A inspections in the ‘Sample Category Items’ tab.

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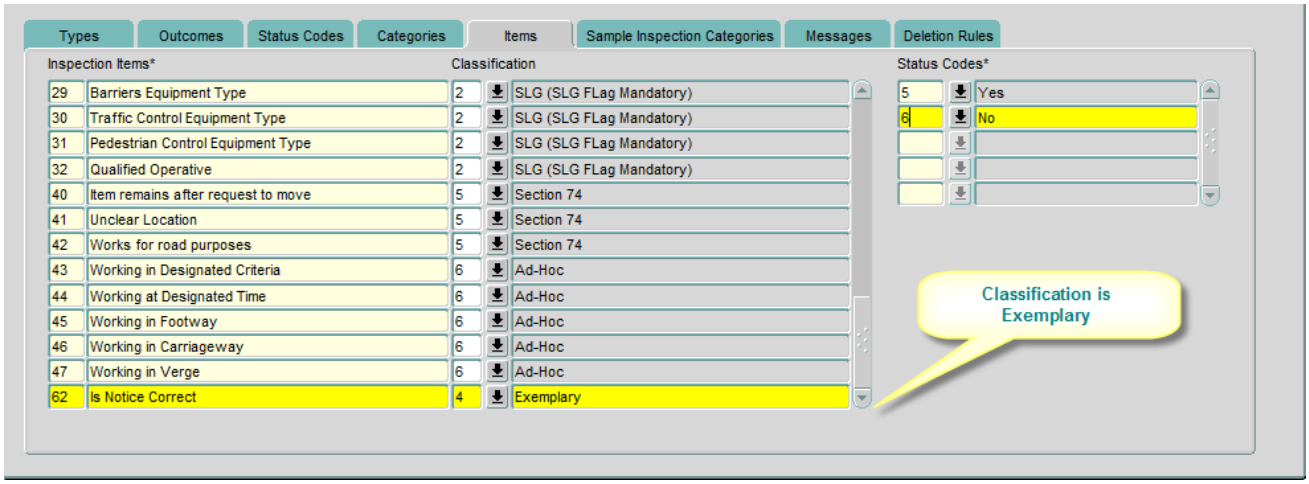
Types
Outcomes
Status Codes
Categories
Items
Sample Inspection Categories
Messages
Deletion Rules
Inspection Items*
Classification
Status Codes*
29 Barriers Equipment Type 2 SLG (SLG FLag Mandatory) 5 Yes
30 Traffic Control Equipment Type 2 SLG (SLG FLag Mandatory) 6 No
31 Pedestrian Control Equipment Type 2 SLG (SLG FLag Mandatory)
32 Qualified Operative 2 SLG (SLG FLag Mandatory)
40 Item remains after request to move 5 Section 74
41 Unclear Location 5 Section 74
42 Works for road purposes 5 Section 74
43 Working in Designated Criteria 6 Ad-Hoc
44 Working at Designated Time 6 Ad-Hoc
45 Working in Footway 6 Ad-Hoc
46 Working in Carriageway 6 Ad-Hoc
47 Working in Verge 6 Ad-Hoc
62 Is Notice Correct 4 Exemplary
Classification is Exemplary

Figure 151 - Exemplary Items

10.1.7 Inspection Sample Category items

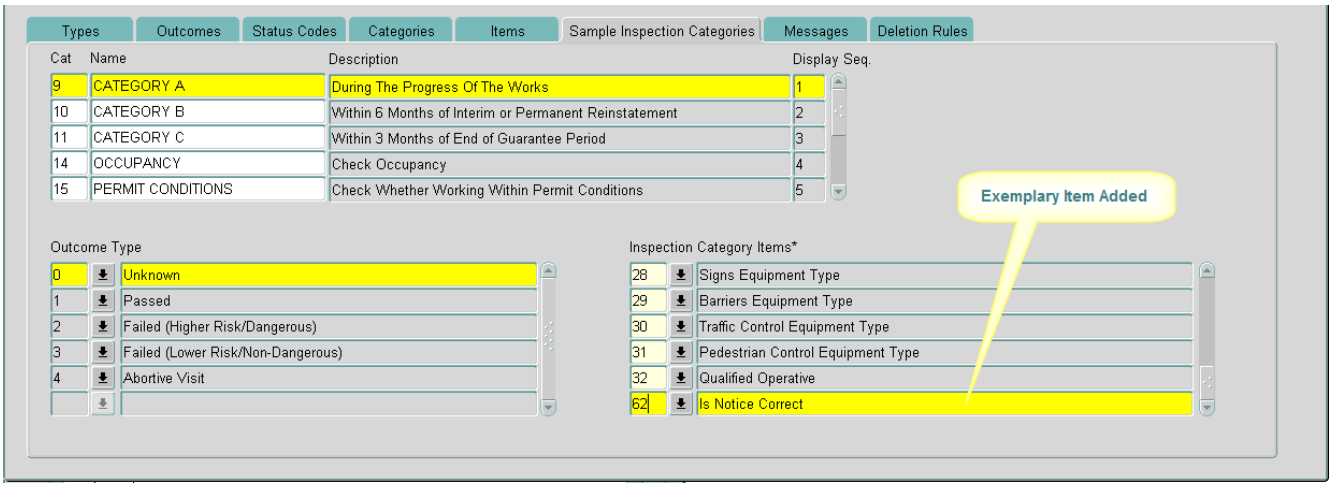

Figure 152 - Sample Category Items

These sample inspection items are used within the system to identify which item has caused a defect on an inspection. They are defined for each inspection category. When completing an inspection the status of each of these items is required to be declared.

All inspection categories and the items relevant to the categories can be reviewed by selecting the category name in the *Cat Name* panel. The *Inspection Item Types* will be detailed in the panel below.

These items will then appear on printed checklists and when results are being entered into the system using *Inspection.* Valid category types will have been defined using the *Categories* type.

New items of a classification of ‘Exemplary’ must be attributed against Category A inspection.

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10.1.8 Inspection Messages

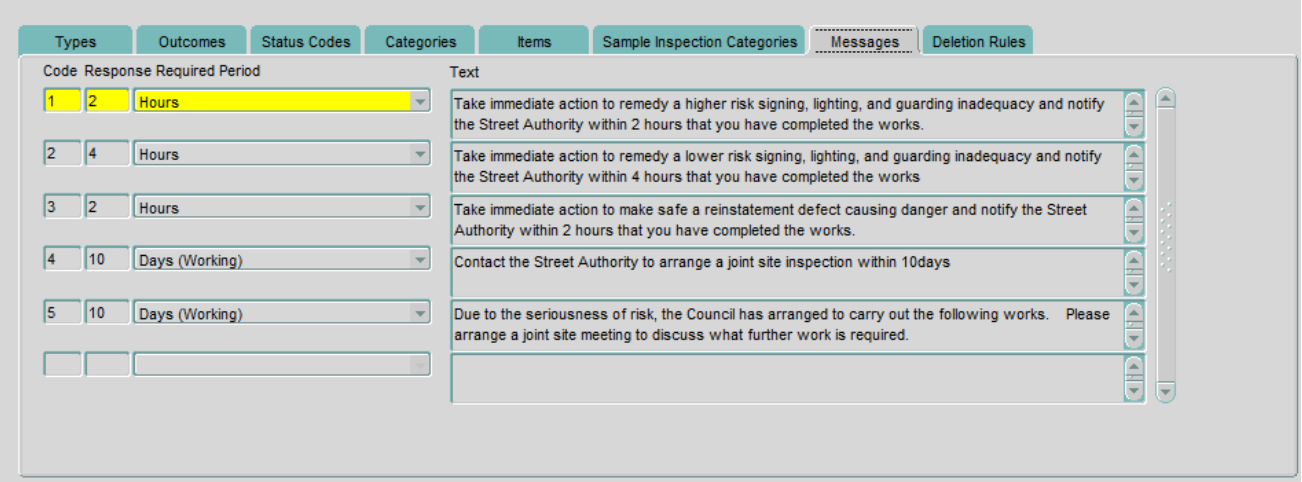
Types
Outcomes
Status Codes
Categories
Items
Sample Inspection Categories
Messages
Deletion Rules
Code
Response
Required Period
Text
1
2
Hours
Take immediate action to remedy a higher risk signing, lighting, and guarding inadequacy and notify the Street Authority within 2 hours that you have completed the works.
2
4
Hours
Take immediate action to remedy a lower risk signing, lighting, and guarding inadequacy and notify the Street Authority within 4 hours that you have completed the works
3
2
Hours
Take immediate action to make safe a reinstatement defect causing danger and notify the Street Authority within 2 hours that you have completed the works.
4
10
Days (Working)
Contact the Street Authority to arrange a joint site inspection within 10days
5
10
Days (Working)
Due to the seriousness of risk, the Council has arranged to carry out the following works. Please arrange a joint site meeting to discuss what further work is required.

Figure 153 - Messages

This form displays the allowable defect messages which can be selected when choosing a defect code on the *Inspection form*.

In order to ensure that any defect is processed according to the correct level of urgency a response time is specified, which the organisation responsible for a defect must respond within before allowing an inspection to lapse. This is specified by entering a numerical value in the *Response* field and by selecting the appropriate value from the *Required Period* field list of values. This form is may used to maintain the required response periods for each defect code.

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10.1.9 Deletion Rules

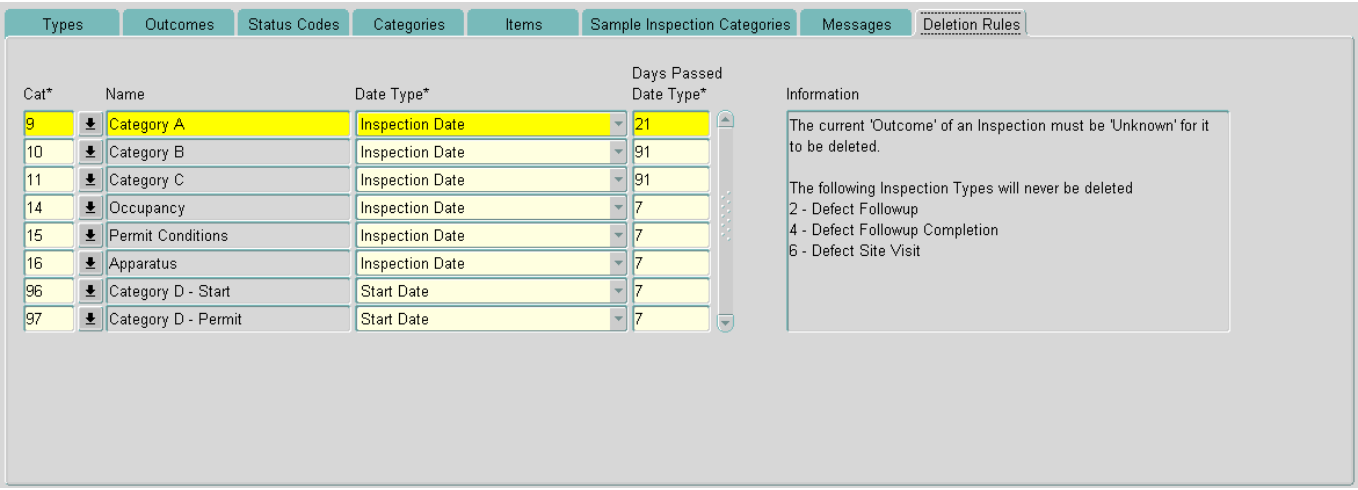
Types
Outcomes
Status Codes
Categories
Items
Sample Inspection Categories
Messages
Deletion Rules
Cat*
Name
Date Type*
Days Passed Date Type*
Information
9 Category A Inspection Date 21
10 Category B Inspection Date 91
11 Category C Inspection Date 91
14 Occupancy Inspection Date 7
15 Permit Conditions Inspection Date 7
16 Apparatus Inspection Date 7
96 Category D - Start Start Date 7
97 Category D - Permit Start Date 7
The current 'Outcome' of an Inspection must be 'Unknown' for it to be deleted.
The following Inspection Types will never be deleted
2 - Defect Followup
4 - Defect Followup Completion
6 - Defect Site Visit

Figure 154 - Deletion Rules

Since the introduction of Category D Ad Hoc Inspections there could be a large number of scheduled inspections that may never be resolved. This form gives the user the option for unresolved inspections to be deleted.

This form allows the user to specify the deletion rules.

For each required category the user can specify a data type and the number of days passed the selected data type for deletion of the category's inspection.

For example in Figure 147:

- Category A - Inspections will be deleted 21 days after the date the inspection was created.
- Category D – Start Inspections will be deleted 7 days after the Works/Phase Actual Start Date.

Note: As specified in the Information box, only inspections with an outcome of 'Unknown' will be eligible for deletion and defect inspections will never be deleted.

Note: Once the deletion rules have been set up the process TMA Inspection Deletion must be set to run out-of-hours.

Note: Refer to Chapter 2 for further information.

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10.2 Inspectors – TMA5290

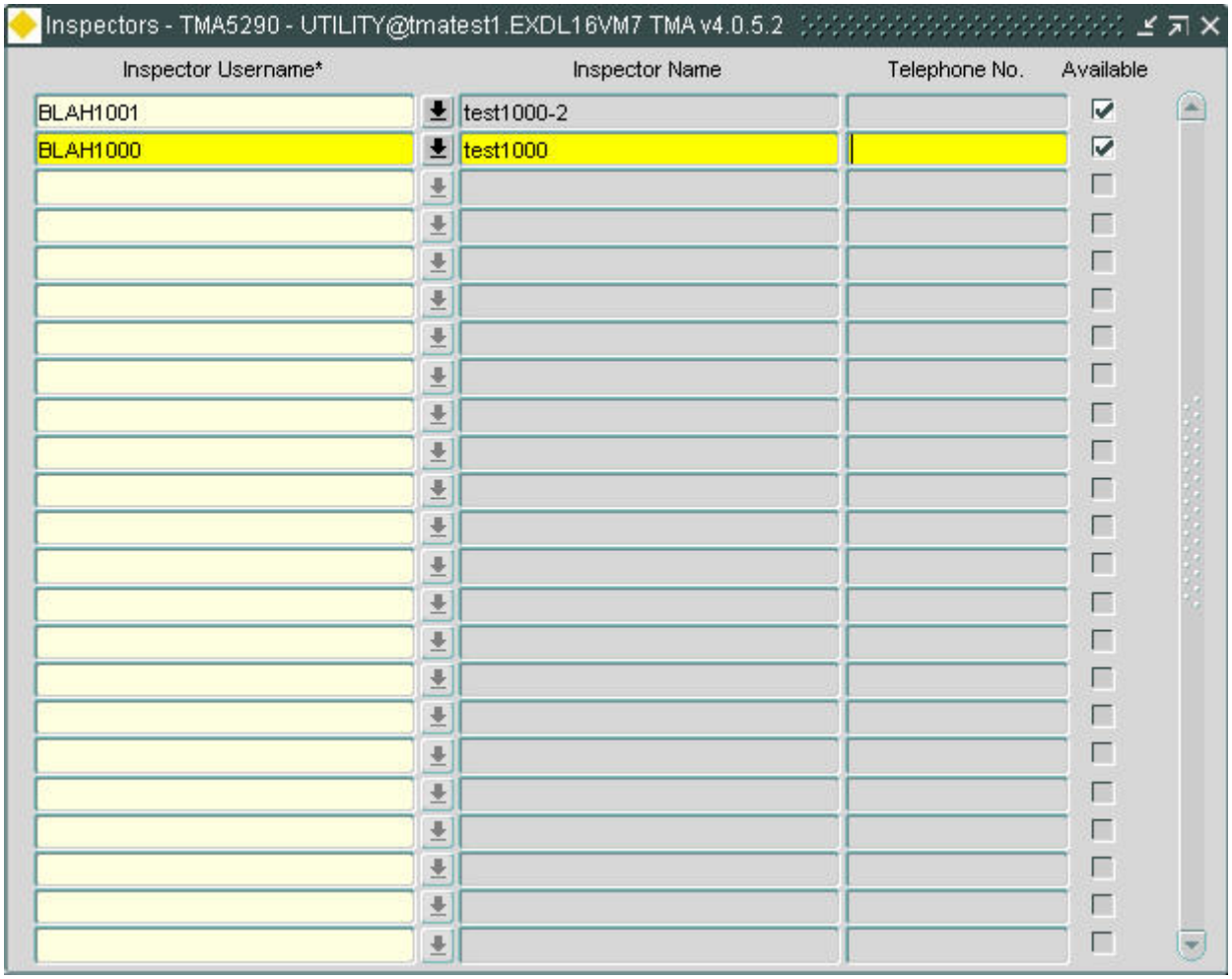

Figure 155 - Inspectors

10.2.1 General Information

The *Inspectors* form is used to identify a list of system users that are also inspectors.

The *Available* checkbox when ticked means that scheduled inspections will be allocated to that inspector if the scheduling is run against a ruleset that the inspector belongs to.

For instance, if an inspector is on leave, the tick may be removed from the checkbox to prevent scheduled inspections being allocated to that inspector.

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10.2.2 Inspectors

Inspector Username	*Mandatory*	*List*

Enter the username of the user set up by the System Administrator that is to be registered as an inspector.

Users will have been defined in form *Users – HIG1832*.

Inspector Name	*Display Only*

The name of the user as set up by the System Administrator will be displayed.

Telephone No	*Display Only*

The telephone number of the user will be displayed as set up by in module *HIG1834 – User Contact Details* and *Product Option – INSPTELTYP*.

Available	*Checkbox*

When ticked this checkbox means that scheduled inspections will be allocated to the inspector if scheduling against a ruleset that the inspector belongs to.

Inspection rulesets are set up using form *Inspection Rulesets – TMA5300*.

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10.3 Inspection Rulesets – TMA5300

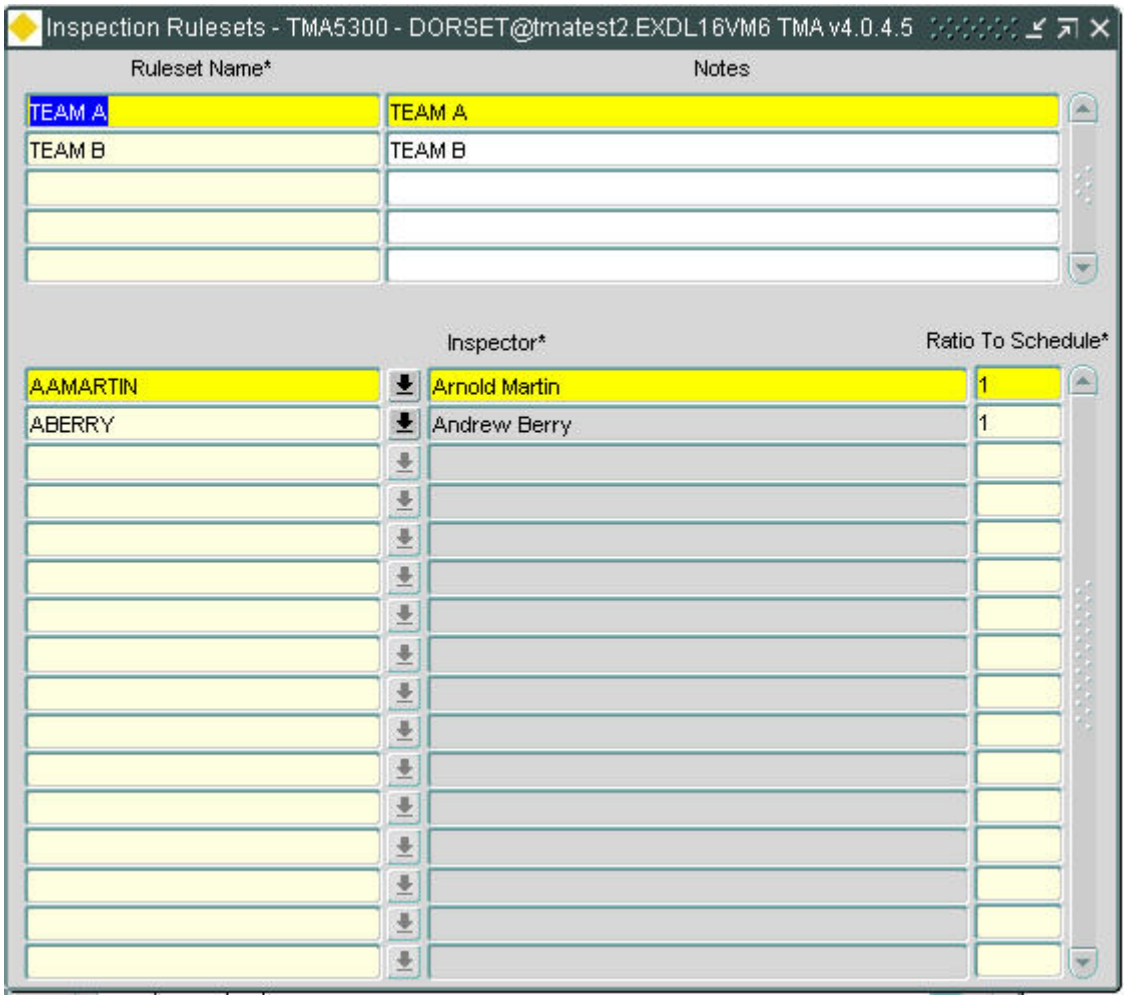

Figure 156 – Inspection Rulesets

10.3.1 General Information

The *Inspection Rulesets* form is used define rulesets for use in the *Annual Inspection Profiles – TMA5110* form. The ruleset then dictates how the resulting scheduled inspections are to be divided amongst the available inspectors.

The *Ratio to Schedule* is used by the scheduler to work out the proportion of inspections to allocate to an inspector within a ruleset. Once the scheduler has allocated the inspections the inspectors name will be appear on the *Inspections – TMA5000* form.

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10.3.2 Inspection Rulesets

Ruleset Name ***Mandatory***

Enter the name for the ruleset

Notes ***Optional***

Enter notes to be attached to the ruleset.

Inspector ***Mandatory*** ***List***

Enter the username of the inspector to be associated with the ruleset.

Inspectors are defined using form *Inspectors – TMA5290*.

Ratio to Schedule ***Mandatory***

Enter the proportions of inspections to be allocated to the inspector when scheduling inspections.

For example:

Rulesets can be set up to include each inspector. However, when one inspector is on leave, a different ruleset can be used.

	Rule Set	Inspector	Ratio
	1	Bob	25
	1	Jamie	75
	2	Bob	10
	2	Roger	30
	2	Phil	60
	3	Bob	10
	3	Roger	25
	3	Phil	25
	3	Jamie	40
Roger on Leave	4	Bob	25
	4	Phil	75
	5	Bob	25
	5	Phil	30
	5	Jamie	45

Figure 157 - Ruleset

By combining the use of street groups and rulesets it means that the entire street authority network is covered, even when an inspector is not available.

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In the example below, the network is broken down into 8 distinct areas (A, B, C, D, E, F, G, H). Each area is allocated to an inspector, but when one inspector is on leave, that inspector's area is shared between the remaining inspectors.

Inspector	Street Group	
Bob	A, B, C	
Roger	D, E	
Phil	F, G, H	
Jamie	D, E, F, G, H	
Bob	A, B, C, D	Roger on Leave
Phil	E, F, G, H	

Figure 158 - Ruleset

Combining the allocation of street groups with the set up of rulesets will keep the continuity of inspections over the whole of the network.

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10.4 Defect Inspection Schedules – TMA5270

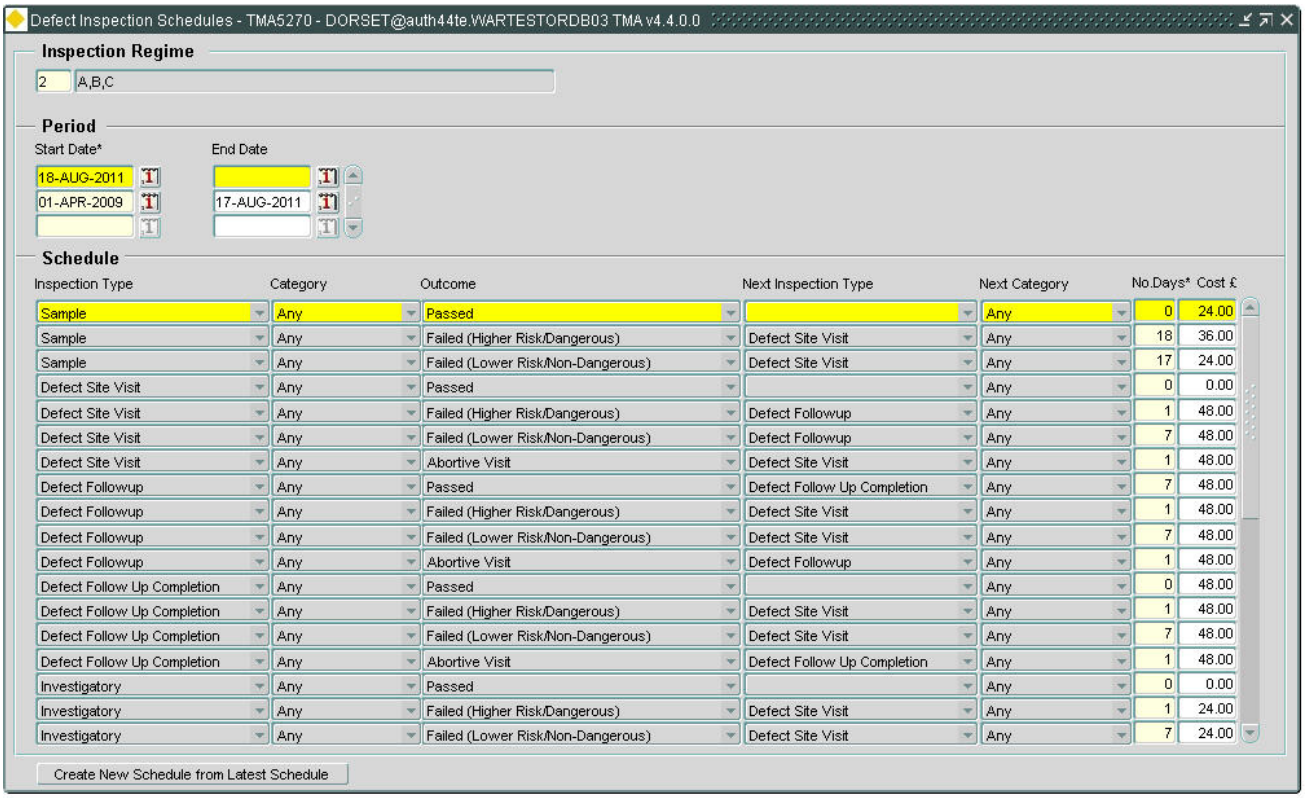
Defect Inspection Schedules - TMA5270 - DORSET@auth44te.WARTESTORDB03 TMA v4.4.0.0
Inspection Regime
2
A,B,C
Period
Start Date*
End Date
18-AUG-2011
01-APR-2009
17-AUG-2011
Schedule
Inspection Type
Category
Outcome
Next Inspection Type
Next Category
No.Days*
Cost £
Sample | Any | Passed | | Any | 0 | 24.00
Sample | Any | Failed (Higher Risk/Dangerous) | Defect Site Visit | Any | 18 | 36.00
Sample | Any | Failed (Lower Risk/Non-Dangerous) | Defect Site Visit | Any | 17 | 24.00
Defect Site Visit | Any | Passed | | Any | 0 | 0.00
Defect Site Visit | Any | Failed (Higher Risk/Dangerous) | Defect Followup | Any | 1 | 48.00
Defect Site Visit | Any | Failed (Lower Risk/Non-Dangerous) | Defect Followup | Any | 7 | 48.00
Defect Site Visit | Any | Abortive Visit | Defect Site Visit | Any | 1 | 48.00
Defect Followup | Any | Passed | Defect Follow Up Completion | Any | 7 | 48.00
Defect Followup | Any | Failed (Higher Risk/Dangerous) | Defect Site Visit | Any | 1 | 48.00
Defect Followup | Any | Failed (Lower Risk/Non-Dangerous) | Defect Site Visit | Any | 7 | 48.00
Defect Followup | Any | Abortive Visit | Defect Followup | Any | 1 | 48.00
Defect Follow Up Completion | Any | Passed | | Any | 0 | 48.00
Defect Follow Up Completion | Any | Failed (Higher Risk/Dangerous) | Defect Site Visit | Any | 1 | 48.00
Defect Follow Up Completion | Any | Failed (Lower Risk/Non-Dangerous) | Defect Site Visit | Any | 7 | 48.00
Defect Follow Up Completion | Any | Abortive Visit | Defect Follow Up Completion | Any | 1 | 48.00
Investigatory | Any | Passed | | Any | 0 | 0.00
Investigatory | Any | Failed (Higher Risk/Dangerous) | Defect Site Visit | Any | 1 | 24.00
Investigatory | Any | Failed (Lower Risk/Non-Dangerous) | Defect Site Visit | Any | 7 | 24.00
Create New Schedule from Latest Schedule

Figure 159 – Defect Inspection Schedules

10.4.1 General Information

The *Defect Inspection Schedules* form displays the matrix containing the defect inspection schedule for all inspection types.

It is populated by default on the installation of the system. Only the 'No. Days' or 'Cost £' fields may be updated in accordance with an organisation's requirements or updated costs.

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10.4.2 Defect Inspection Schedules

Inspection Regime	*Required/Default*

This value will show the inspection regime.

Start Date	*Required*

The start date of the inspection regime entered in the previous field will be shown.

End Date	*Optional*

Enter the end date of the inspection regime. If the inspection regime is current this field will remain blank.

Inspection Type	*Display Only*

The inspection type will be displayed. Inspection types will have been defined in form *Inspection Metadata – TMA5200* under the *Types* tab.

Category	*Display Only*

The category for the inspection type will be displayed.

Outcome	*Display Only*

The outcome of the inspection type entered in the previous field will be displayed. Inspection outcomes will have been defined in form *Inspection Metadata – TMA5200* under the *Outcomes* tab.

Next Inspection Type	*Display Only*

The inspection type to follow the inspection and outcome of inspection defined in the previous fields will be displayed. Inspection types will have been defined in form *Inspection Metadata – TMA5200* under the *Types* tab.

Next Category	*Display Only*

The next category for the inspection type will be displayed.

No Days	*Required*

Enter the number of days to elapse before the next inspection.

Cost £	*Required*

Enter the cost of the inspection.

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10.4.2.1 Create New Schedule

When the cost of inspections is increased it is possible to copy the current schedule and then update the costs in new schedule. This will keep a history of the previous costs and allow inspections to be charged at the rate relevant to the date inspected.

To update the cost of inspections the following steps should be taken.

1. Select the [Create New Schedule from Latest Schedule] button.
2. In the 'End Date' field of the current schedule enter the date the current cost of inspections changes.
3. In the 'Start Date' for the new schedule enter the date the new charges become effective. This should be the date after the 'End Date' of the previous schedule.
4. In the 'Cost £' field of the new schedule make the relevant changes to reflect the new charges.

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